



Town of Arlington Select Board

Meeting Agenda

February 12, 2025

7:15 PM

Members of the public may access the hybrid meeting via Select Board Chambers, Zoom, or
ACMI

1. Legislative Provision for Remote Participation
2. Approval of Sale of \$174,275 Sewer Bond dated February 24, 2025 to the Massachusetts Water Resources Authority for Inflow and Infiltration Local Financial Assistance Program
Julie Wayman, Treasurer
3. To Review and Approve General Obligation Bonds
Julie Wayman, Town Treasurer

CONSENT AGENDA

4. Minutes of Meeting: January 13, 2025
5. Request: Special (One Day) Beer & Wine License, 2/22/2025 @ Whittemore Robbins House for Private Event
Hannah Halerin-Goldstein
6. Public Memorials Committee Approvals
Alexander J. Salipante, Chair of Public Memorials Committee
7. Request: Special (One Day) Beer & Wine License, 4/5/2025 @ Lesley Ellis School for Private Event
Jenn Champagne
8. Acceptance of Funds From Various Entities
Christine Bongiorno, Deputy Town Manager or Operations
9. Request: Contractor/Drainlayer License
C.F. Russell Excavating LLC
Cole Russell
Wilmington, MA 01887
10. Acceptance of Certain Capital Contributions/33 Ryder Street
James Feeney, Town Manager
11. 2025 Farmers' Market
Johanna Niles, Market Manager

12. Vote: Authorizing In Person Early Voting for Annual Town Election and Police Details for the Annual Town Election, April 5, 2025
Julie Brazile, Town Clerk

APPOINTMENTS

13. Elderly and Disabled Tax Relief Committee
Melissa McInerney (Term to Expire: 12/31/2027)

LICENSES & PERMITS

14. For Approval: Common Victualler License
Jorvan Enterprise INC d/b/a Haveli Indian Cuisine, Kulwinder Singh Uppal, 464 Massachusetts Avenue

OPEN FORUM

Except in unusual circumstances, any matter presented for consideration of the Board shall neither be acted upon, nor a decision made the night of the presentation in accordance with the policy under which the Open Forum was established. It should be noted that there is a three minute time limit to present a concern or request.

TRAFFIC RULES & ORDERS / OTHER BUSINESS

15. Removal of Certain Parking Signs on Mystic Street
Jim Feeney, Town Manager
16. Town Manager Evaluation

NEW BUSINESS

Next Scheduled Meeting of Select Board February 24, 2025

When: Feb 12, 2025 07:15 PM Eastern Time (US and Canada)

Topic: Select Board Meeting

Register in advance for this webinar:

https://town-arlington-ma-us.zoom.us/webinar/register/WN_9E_GaCzGTsqNhc0Usujfng

After registering, you will receive a confirmation email containing information about joining the webinar.

Notice to the Public on meeting privacy In the interests of preventing abuse of videoconferencing technology (i.e. Zoom Bombing) all participants, including members of the public, wishing to engage via the Zoom App must register for each meeting and will notice multi-step authentication protocols. Please allow additional time to join the meeting. Further, members of the public who wish to participate without providing their name may still do so by telephone dial-in information provided above.



Town of Arlington, Massachusetts

Legislative Provision for Remote Participation



Town of Arlington, Massachusetts

Approval of Sale of \$174,275 Sewer Bond dated February 24, 2025 to the Massachusetts Water Resources Authority for Inflow and Infiltration Local Financial Assistance Program

Summary:

Julie Wayman, Treasurer

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	MWRA_Water_Borrowing_Feb_2025.pdf	MWRA Water Borrowing
▢	Reference Material	MWRA_Bond_-_Sewer_-_Arlington_02-24-25.pdf	MWRA Bond - Sewer
▢	Reference Material	MWRA_Certificate_-_Sewer_-_Arlington_02-24-25.pdf	MWRA Certificate - Sewer
▢	Reference Material	MWRA_Vote_of_Select_Board_-_Sewer.pdf	MWRA Vote - Sewer



Office of the Treasurer & Collector of Taxes

Julie Wayman
Town of Arlington
Arlington, MA 02476

Treasurer & Collector of Taxes
730 Massachusetts Avenue
Telephone Number: 781-316-3031

MEMORANDUM

DATE: February 10, 2025
TO: Stephen DeCoursey, Select Board Chair
CC: Jim Feeney, Town Manager
Alex Magee, Deputy Town Manager/ Finance Director
Ida Cody, Comptroller
RE: Approval of Interest Free Sewer Bond with Massachusetts Water Resources Authority in the amount of \$174,275

In accordance with the Town Meeting favorable action of Article 43 voted April 24, 2024 which authorized a total of \$800,000 Appropriation/ APPROPRIATION / FINANCING OF CONSTRUCTION OR RECONSTRUCTION OF SEWERS AND SEWERAGE FACILITIES, the Town submitted application for assistance for reduction of inflow and infiltration by rehabilitation and repair to sewer infrastructure. The Town project application has been approved as eligible for the Massachusetts Water Resource Authority (MWRA) I/I Local Financial Assistance Program.

The Sewer Bond in the amount of \$174,275 is interest free for a term of ten years and debt service begins February 15, 2026 in annual payments of \$17,427.50. A grant in the amount of \$522,825 is expected to be received from the Authority on February 27, 2025.

I respectfully request favorable consideration and vote by the Select Board for sale of the Sewer Bond in the amount of \$174,275 as represented in the attached Vote of the Select Board.

Attachments

CC:

Jim Feeney, Town Manager

Alex Magee, Deputy Town Manager
Michael Rademacher, Director of Public Works
Wayne Chouinard, Town Engineer
William Copithorne, Assistant Town Engineer
Ida Cody, Comptroller

\$174,275

\$174,275

THE COMMONWEALTH OF MASSACHUSETTS

TOWN OF ARLINGTON

SEWER BOND

The Town of Arlington (hereinafter called the “Municipality”) in the County of Middlesex and in The Commonwealth of Massachusetts promises to pay to the Massachusetts Water Resources Authority (hereinafter called the “Authority”), or registered assigns, the sum of One Hundred Seventy-Four Thousand Two Hundred Seventy-Five Dollars (\$174,275) in installments on February 15 of each year as set forth below, without interest:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2026	\$17,427.50	2031	\$17,427.50
2027	17,427.50	2032	17,427.50
2028	17,427.50	2033	17,427.50
2029	17,427.50	2034	17,427.50
2030	17,427.50	2035	17,427.50

Principal payments on this bond are payable at the offices of the Authority at Deer Island, 33 Tafts Avenue, Boston, Massachusetts 02128. Upon final payment of the principal of this bond the Authority shall cancel this bond and return it to the Municipality.

This bond is the only instrument representing a borrowing of \$174,275 issued by the Municipality pursuant to Chapter 44 of the General Laws as amended and a vote of the Municipality duly passed on the twenty-fourth day of April 2024. This bond is issued for the purpose of defraying the cost of improvements to the Municipality’s sewer system as described in said vote.

This bond is a general obligation of the Municipality and the full faith and credit of the Municipality is pledged for the payment of principal on this bond as the same shall become due and payable.

This bond is transferable only upon presentation to the Treasurer of the Municipality with a written assignment duly acknowledged or proved. No transfer hereof shall be effectual unless made on the books of the Municipality kept by the Treasurer as transfer agent and noted thereon by the Treasurer with a record of payments.

In Witness Whereof the Municipality has caused this bond to be signed by its Treasurer and countersigned by its Select Board and the seal of the Municipality to be affixed hereto as of the twenty-fourth day of February 2025.

TOWN OF ARLINGTON,
MASSACHUSETTS

By: _____
Treasurer

Countersigned:

Select Board

(TOWN SEAL)

(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

Town of Arlington, Massachusetts

\$174,275 Sewer Bond

CERTIFICATE

We, the members of the Select Board and the Treasurer of the Town of Arlington, Massachusetts (the “Town”), certify that we have signed the \$174,275 Sewer Bond (the “Bond”) of the Town dated February 24, 2025, and payable, without interest, in installments on February 15 of each year as set forth below:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2026	\$17,427.50	2031	\$17,427.50
2027	17,427.50	2032	17,427.50
2028	17,427.50	2033	17,427.50
2029	17,427.50	2034	17,427.50
2030	17,427.50	2035	17,427.50

The Bond bears the Town seal, which is also affixed to this certificate.

We further certify that the Loan Agreement with the Massachusetts Water Resources Authority (the “Authority”) dated February 24, 2025 providing for the sale of the Bond has been signed by the Treasurer, and that the Financial Assistance Agreement dated February 24, 2025 relating to the Project financed by the Bond has been signed by the Town Manager and we hereby confirm those Agreements. The Loan Agreement and the Financial Assistance Agreement are sometimes referred to collectively in this certificate as the “Agreements.” Capitalized terms used in this certificate and not otherwise defined shall have the same meanings given those terms in the Agreements.

We, the members of the Select Board and the Treasurer, also certify as follows:

1. Authority. The Bond is issued pursuant to G.L. c.44 §8(14) and a vote of the Town passed April 24, 2024 (Article 43), which authorized a total borrowing of \$800,000.

The issuance of the Bond and the execution of the Agreements were further authorized by a vote of the Select Board passed at a duly called meeting of the Board held February 12, 2025 (the “Select Board Vote”).

2. Other Debt. No other debt has been incurred under that vote of the Town.

3. Use of Project and Loan Proceeds.

(a) No Reimbursement. None of the proceeds of the Loan and the Bond are being used by the Town to reimburse the Town for expenditures previously made from funds other than proceeds of a borrowing.

(b) Prior Notes or Bonds. No proceeds of the Loan or the Bond will be used to pay or retire any notes, bonds or other evidence of indebtedness previously issued by the Town

(c) No Sale of Project. The Town does not expect to sell any Project prior to repayment of the Loan and the Bond.

(d) Use in Trade or Business. Not more than 5% of the gross proceeds of the Loan or the Bond are to be used (directly or indirectly) in any trade or business carried on by any person other than a state or local governmental unit. (Use in a trade or business includes all activities carried on by the federal government (including its agencies and instrumentalities), by so-called Section 501(c)(3) organizations and by all other nongovernmental entities other than natural persons not engaged in a trade or business, but does not include use as a member of or on the same basis as the general public.) The Town does not have or plan to have any contract or other arrangement not applicable to the general public under which a party, other than the Commonwealth or a local governmental unit, is to have the use of the Project or is to make payments based on costs of the Project rather than system costs.

(e) Private Loans. None of the gross proceeds of the Loan or the Bond are to be used by the Town directly or indirectly to make or finance loans to others. (The foregoing representation does not preclude the financing of a Project whose costs are to be paid by betterment assessments over a period of years.)

I, the Treasurer, hereby certify that the Bond was delivered on this date and the full purchase price of \$174,275 and a grant in the amount of \$522,825 are expected to be received from the Authority on February 27, 2025.

I, the Town Accountant, hereby certify that the rates and charges have been set at a sufficient level to cover the estimated operating expenses and debt service related to the Sewer Enterprise Fund, including the debt service relating to the Bond.

We, the members of the Select Board, the Treasurer and the Town Clerk, hereby certify as follows:

(a) Authorization, Execution and Delivery of Documents. The Loan Agreement, the Financial Assistance Agreement and the Bond have been duly authorized, executed and delivered. None of those instruments has been amended or supplemented since its date (except such amendments or supplements which have been approved by the Authority) or repealed and each such instrument remains in full force and effect as of this date.

(b) Signatures and Incumbency. The signatures of the Treasurer and the members of the Select Board as appearing below are the genuine signatures of the persons who

executed the Bond and who held those offices when the Agreements and the Bond were signed and when they were delivered.

(c) Open Meeting Law. Except for the town meeting called pursuant to G.L. c.39, §10, all proceedings essential to the issue of the Bond and the authorization, execution and delivery of the Agreements and deliberations of a quorum relating thereto have been taken at a meeting or meetings open to the public; notice of each such meeting was filed in the office of the Town Clerk and publicly posted in the time and manner set forth in G.L. c.30A, §§18-25, as amended, or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b); no deliberations, decision or vote in connection with the Bond or the Agreements were taken in executive session and no vote was taken by secret ballot; and the official record of each such meeting was made available to the public and remains available to the public as set forth in G.L. c.30A, §§18-25, as amended.

(d) Proceedings. No proceeding essential to the authorization, execution, delivery or issue of the Agreements and the Bond has been repealed or amended except as stated in paragraph (1) above, and no proceedings have been taken relating to the Agreements and the Bond other than those certified to Troutman Pepper Locke LLP.

(e) Bylaws. The bylaws described below are the only bylaws or standing votes of the Town affecting the authorization, sale or issue of the Bond, including the calling and conduct of town meetings, or the authorization, execution or delivery of the Agreements, and there has been no change therein affecting those matters in any way except as may be indicated below:

By-Laws of the Town of Arlington, Massachusetts as amended through May 13, 2024 as certified to Troutman Pepper Locke LLP on January 28, 2025.

(f) Home Rule. The Town has not adopted a home rule charter and the Town has not amended or repealed any special law relating to the Town through the use of home rule procedures.

(g) Select Board Vote. Attached hereto is a true copy of the Select Board Vote, which has not been amended or repealed and remains in full force and effect on this date.

(h) Development Districts. The Town has not established any development districts pursuant to G.L. c.40Q.

(i) Execution of Counterparts and Delivery by Electronic Means. This certificate (the "Certificate") may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to the Certificate by electronic mail in a ".pdf" file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to the Certificate. Electronic signatures on the Certificate shall be deemed original signatures for the purposes of the Certificate and all matters relating thereto, having the same legal effect as original signatures.

(j) No Litigation; No Financial Interest. There has been no litigation affecting the authorization, execution, delivery, validity or issue of the Agreements or the Bond or the power of the Town to levy and collect taxes to pay the Bond; none is pending or to our knowledge threatened; neither the corporate existence nor boundaries of the Town nor the title of any of us to our respective offices is being contested; and none of us and, to the best of our knowledge, no other official of the Town has any direct or indirect financial interest in or relationship with the Authority.

Dated: February 24, 2025
(date of delivery of and
payment for the Bond)

TOWN OF ARLINGTON,
MASSACHUSETTS

Select Board

By: _____
Treasurer

Town Accountant

Town Clerk

(TOWN SEAL)

VOTE OF THE SELECT BOARD

I, the Clerk of the Select Board of the Town of Arlington, Massachusetts, certify that at a meeting of the board held February 12, 2025, of which meeting all members of the board were duly notified and at which a quorum was present, the following votes were unanimously passed, all of which appear upon the official record of the board in my custody:

Voted: that the sale of the \$174,275 Sewer of the Town dated February 24, 2025, to the Massachusetts Water Resources Authority (the “Authority”) is hereby approved and the Town Treasurer or other appropriate Town official is authorized to execute on behalf of the Town a Loan Agreement and a Financial Assistance Agreement with the Authority with respect to the bond. The bond shall be payable without interest on February 15 of the years and in the principal amounts as follows:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2026	\$17,427.50	2031	\$17,427.50
2027	17,427.50	2032	17,427.50
2028	17,427.50	2033	17,427.50
2029	17,427.50	2034	17,427.50
2030	17,427.50	2035	17,427.50

Further Voted: that any certificates or documents relating to bond (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures;

Further Voted: that all action taken to date by the Town and its officers and agents to carry out this financing, including the execution of any application agreement by the Treasurer or any other official of the Town, are hereby ratified, approved and confirmed; and

Further Voted: that each member of the Select Board, the Town Clerk and the Town Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing vote.

[Remainder of page intentionally left blank; signature page follows.]

I further certify that the votes were taken at a meeting open to the public, that no vote was taken by secret ballot, that a notice stating the place, date, time and agenda for the meeting (which agenda included the adoption of the above votes) was filed with the Town Clerk and a copy thereof posted in a manner conspicuously visible to the public at all hours in or on the municipal building that the office of the Town Clerk is located or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b), at least 48 hours, not including Saturdays, Sundays and legal holidays, prior to the time of the meeting and remained so posted at the time of the meeting, that no deliberations or decision in connection with the sale of the bond were taken in executive session, all in accordance with G.L. c.30A, §§18-25, as amended.

Dated: February 12, 2025

Clerk of the Select Board



Town of Arlington, Massachusetts

To Review and Approve General Obligation Bonds

Summary:

Julie Wayman, Town Treasurer

ATTACHMENTS:

Type	File Name	Description
▢ Reference Material	Memo_Town_Treasurer_February_2025_Borrowing.pdf	Memo Town Treasurer
▢ Reference Material	Bond_Form_and_Opinion.pdf	Bond Form and Opinion
▢ Reference Material	Certificate_-_Arlington_Bonds.pdf	Certificate - Arlington Bonds
▢ Reference Material	Continuing_Disclosure_Certificate_-_Arlington.pdf	Continuing Disclosure Certificate - Arlington
▢ Reference Material	Select_Board_Vote_-_Arlington_Bonds.pdf	Select Board Vote
▢ Reference Material	Tax_Certificate_-_N\$_Bonds_-_Arlington.pdf	Tax Certificate - N\$ Bonds - Arlington



Office of the Treasurer & Collector of Taxes

**Town of Arlington, Massachusetts
730 Massachusetts Avenue
Arlington, MA 02476**

Telephone Number: 781-316-3031

MEMORANDUM

DATE: February 10, 2025
TO: Stephen DeCoursey, Select Board Chair
CC: Jim Feeney, Town Manager
Alex Magee, Deputy Town Manager/ Finance Director
Ida Cody, Comptroller
FROM: Julie Wayman, Treasurer/Collector
RE: \$11,355,000 General Obligation Municipal Purpose Loan of 2025 Bonds, Exempt Debt Bonds

The Town received fifteen competitive bids from bond underwriters on Wednesday, February 5, 2025, for a \$11,355,000 30-year general obligation bond issue, including exempt and non-exempt, general funds. Fidelity Capital Markets was the winning bidder on the bonds again this year, with an average interest rate of 3.539%. Bond proceeds of \$752,127 were also received from the winning bidder, which was used to reduce the cost of one non-exempt capital project, and the exempt project, the Arlington High School.

Non-exempt items funded by the bond are \$5,960,000 million for various projects town-wide for Capital Improvements as voted by the Town Meeting in 2024. The issuance also included \$5,500,000 million of exempt debt for the Arlington High School project to meet cashflow needs on that project over the next year.

The bids for the bonds were accepted at the offices of the Town's Financial Advisor, Hilltop Securities Inc., at 54 Canal Street in Boston, Massachusetts.

Prior to the sale, S&P Global Ratings, a municipal bond credit rating agency, affirmed the Town's long-term rating of 'AAA', the highest rating attainable, after a bond rating call with the Town's Manager and the Finance Team, on Wednesday, January 22, 2025. The rating agency cited the Town's balanced operations, conservative budgeting practices, affluent tax base, and strong management framework as positive credit factors.

I respectfully request your favorable consideration and vote for sale of these bonds that will close on February 27, 2025.

Attachments

R-1

\$235,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2026	041609 2T4	February 27, 2025

PRINCIPAL AMOUNT: TWO HUNDRED THIRTY-FIVE THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

This bond is one of an issue of \$11,355,000 aggregate principal amount issued by the Town pursuant to Chapters 44 and 70B of the General Laws as amended for school building improvement, municipal building improvement, departmental equipment, and recreation improvement purposes. The bonds are issuable only in fully registered form in the denomination of five thousand dollars (\$5,000) or any integral multiple thereof.

The bonds are general obligations of the Town and the full faith and credit of the Town is pledged for the payment of principal of and interest on the bonds as the same shall become due and payable.

The bonds are being issued by means of a book entry system, with bond certificates immobilized at The Depository Trust Company, New York, New York (“DTC”) evidencing ownership of the bonds in principal amounts of five thousand dollars (\$5,000) or integral multiples thereof, and with transfers of beneficial ownership effected on the records of DTC and its participants pursuant to rules and procedures established by DTC. Bond certificates are not available for distribution to the public. The principal or redemption price, if any, of and interest on this bond are payable by U.S. Bank Trust Company, National Association, or its successor as paying agent (the “Paying Agent”) for the Town, to the Registered Owner of this bond, as nominee of DTC. Transfer of principal, redemption price, if any, and interest payments to participants of DTC is the responsibility of DTC; transfer of principal, redemption price, if any, and interest payments to beneficial owners by participants of DTC will be the responsibility of such participants and other nominees of beneficial owners. The Town is not responsible or liable for maintaining, supervising or reviewing the records maintained by DTC, its participants or persons acting through such participants.

In the event that (a) DTC determines not to continue to act as securities depository for the bonds or (b) the Town Treasurer determines that continuation of the book entry system of evidence and transfer of ownership would adversely affect the interests of the beneficial owners of the bonds, the Town will discontinue the book entry system with DTC. If the Town fails to identify another qualified securities depository to replace DTC, the Paying Agent will authenticate and deliver replacement bonds in the form of fully registered certificates.

This bond is transferable only upon the books of the Town which shall be kept for such purpose by the Paying Agent. This bond may not be transferred or exchanged in a manner which would involve the delivery of bond certificates to the beneficial owners of bonds unless the book entry system has been discontinued by the Town in accordance with the preceding paragraph, in which case replacement bonds may be issued in accordance with law and such procedures as the Town Treasurer shall deem appropriate.

The bonds of this issue (except the bonds maturing on or before February 1, 2034, which are not subject to redemption prior to maturity) are redeemable prior to maturity on or after February 1, 2034, at the option of the Town, as a whole or in part at any time, at a price equal to the principal amount to be redeemed (without premium) plus accrued interest to the redemption date.

The bonds of this issue maturing on February 1, 2051 (the “Term Bond”), unless called for earlier redemption as provided above, shall be retired in part prior to maturity by mandatory serial redemptions in the principal amounts specified below, at a price equal to the principal amount to be redeemed (without premium) plus accrued interest to the redemption date:

Term Bond due February 1, 2051

<u>Date</u>	<u>Principal Amount</u>
February 1, 2046	\$235,000
February 1, 2047	245,000
February 1, 2048	255,000
February 1, 2049	265,000
February 1, 2050	265,000
February 1, 2051 (maturity)	255,000

The Town may purchase all or any portion of the Term Bond from any available funds at a price not exceeding par and accrued interest. Any principal amount of the Term Bond purchased and surrendered to the Paying Agent prior to December 1 in the year preceding a year in which mandatory redemption is required for the Term Bond (unless previously applied as a credit against a mandatory redemption requirement) shall be credited against the principal amount required to be called and prepaid or paid on the following February 1.

In the event any bonds are called for redemption, notice will be sent by mail, or in such other manner acceptable to DTC, not more than sixty (60) days nor less than thirty (30) days prior to the redemption date to the registered owner of such bonds, as nominee of DTC. It will be the responsibility of DTC and its participants to give notice of the redemption to beneficial owners of the bonds to be redeemed. With respect to the redemption of any such bond, failure to mail notice to the registered owner of any other bond, any defect in the notice to the registered owner of any other bond, or failure by DTC and its participants to provide notice of redemption to the beneficial owners of such bond will not affect the redemption of such bond. Notice of redemption having been duly given, the bonds to be redeemed, or the portions called for redemption, will become due and payable on the redemption date at the applicable redemption price and, moneys for the redemption having been deposited with the Paying Agent, from and after the date fixed for redemption interest on such bonds, or such portions, will no longer accrue.

With respect to any bond subject to redemption, portions of the principal amount of such bond in the amount of five thousand dollars (\$5,000) or any multiple thereof may be redeemed. In the event of such a partial redemption, the identity of the beneficial owners whose beneficial interests in any such bond are to be redeemed and the amount of any such redemption shall be determined by DTC and its participants by lot in such manner as DTC and its participants shall deem appropriate. If less than all of the principal amount of any bond is to be redeemed, upon surrender of such bond to the Paying Agent there will be issued to the registered owner, without charge, a new bond for the unredeemed principal sum.

The Town hereby covenants that it will take all lawful action necessary to comply with all requirements of the Internal Revenue Code of 1986, as amended, that must be satisfied subsequent to the issuance of the bonds in order that interest on the bonds be and continue to be excluded from gross income for federal income tax purposes and it will refrain from taking any action that would cause interest on the bonds to become included in gross income for federal income tax purposes.

In connection with the offering of the bonds the Town has executed a Continuing Disclosure Certificate (as it may be amended from time to time, the "Certificate"). The Town hereby covenants to comply with the provisions of the Certificate, and reference is made to the Certificate for a description of the nature and extent of the obligations of the Town and the rights of the owners of the bonds under the Certificate. The Certificate is described in the Official Statement relating to the bonds. A copy of the Certificate is available from the Town upon request.

TOWN OF ARLINGTON,
MASSACHUSETTS

By: _____
Treasurer

Countersigned:

Select Board

(Town Seal)

LEGAL OPINION

The following opinion is based on facts and the law existing on the date of original delivery of the bonds described therein.

TROUTMAN PEPPER LOCKE LLP
111 Huntington Avenue
Boston, Massachusetts

Julie Wayman, Treasurer
Town of Arlington
Arlington, Massachusetts

\$11,355,000
Town of Arlington, Massachusetts
General Obligation Municipal Purpose Loan of 2025 Bonds
Dated February 27, 2025

We have acted as bond counsel to the Town of Arlington, Massachusetts (the “Town”) in connection with the issuance by the Town of the above-referenced bonds (the “Bonds”). In such capacity, we have examined the law and such certified proceedings and other papers as we have deemed necessary to render this opinion.

As to questions of fact material to our opinion we have relied upon representations and covenants of the Town contained in the certified proceedings and other certifications of public officials furnished to us, without undertaking to verify the same by independent investigation.

Based on our examination, we are of the opinion, under existing law, as follows:

1. The Bonds are valid and binding general obligations of the Town and, except to the extent they are paid from other sources, the principal of and interest on the Bonds are payable from taxes which may be levied upon all taxable property in the Town, without limitation as to rate or amount, except as provided under Chapter 44, Section 20 of the General Laws, with respect to that portion of the principal and interest payments that the Town has voted to exempt from the limit imposed by Chapter 59, Section 21C of the General Laws, and subject to the limit imposed by Chapter 59, Section 21C of the General Laws with respect to that portion of the principal and interest payments that the Town has not voted to exempt from that limit.

2. Interest on the Bonds is excluded from the gross income of the owners of the Bonds for federal income tax purposes. In addition, interest on the Bonds is not a specific preference item for purposes of the federal individual alternative minimum tax. However, interest on the Bonds will be included in the “adjusted financial statement income” of certain corporations that are subject to the alternative minimum tax under Section 55 of the Internal Revenue Code of 1986 (the “Code”). In rendering the opinions set forth in this paragraph, we

have assumed compliance by the Town with all requirements of the Code that must be satisfied subsequent to the issuance of the Bonds in order that interest thereon be, and continue to be, excluded from gross income for federal income tax purposes. The Town has covenanted to comply with all such requirements. Failure by the Town to comply with certain of such requirements may cause interest on the Bonds to become included in gross income for federal income tax purposes retroactive to the date of issuance of the Bonds. We express no opinion regarding any other federal tax consequences arising with respect to the Bonds.

3. Interest on the Bonds is exempt from Massachusetts personal income taxes and the Bonds are exempt from Massachusetts personal property taxes. We express no opinion regarding any other Massachusetts tax consequences arising with respect to the Bonds or any tax consequences arising with respect to the Bonds under the laws of any state other than Massachusetts.

This opinion is expressed as of the date hereof, and we neither assume nor undertake any obligation to update, revise, supplement or restate this opinion to reflect any action taken or omitted, or any facts or circumstances or changes in law or in the interpretation thereof, that may hereafter arise or occur, or for any other reason.

The rights of the holders of the Bonds and the enforceability of the Bonds may be subject to bankruptcy, insolvency, reorganization, moratorium and other similar laws affecting creditors' rights heretofore or hereafter enacted to the extent constitutionally applicable, and their enforcement may also be subject to the exercise of judicial discretion in appropriate cases.

/S/ TROUTMAN PEPPER LOCKE LLP

United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2027	041609 2U1	February 27, 2025
PRINCIPAL AMOUNT:	SIX HUNDRED FORTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

This bond is one of an issue of \$11,355,000 aggregate principal amount issued by the Town pursuant to Chapters 44 and 70B of the General Laws as amended for school building improvement, municipal building improvement, departmental equipment, and recreation improvement purposes. The bonds are issuable only in fully registered form in the denomination of five thousand dollars (\$5,000) or any integral multiple thereof.

United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2028	041609 2V9	February 27, 2025
PRINCIPAL AMOUNT:	SIX HUNDRED FORTY-FIVE THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2029	041609 2W7	February 27, 2025
PRINCIPAL AMOUNT:	SIX HUNDRED FORTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2030	041609 2X5	February 27, 2025
PRINCIPAL AMOUNT:	SIX HUNDRED FORTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2031	041609 2Y3	February 27, 2025
PRINCIPAL AMOUNT:	FIVE HUNDRED NINETY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2032	041609 2Z0	February 27, 2025
PRINCIPAL AMOUNT:	FIVE HUNDRED EIGHTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2033	041609 3A4	February 27, 2025

PRINCIPAL AMOUNT: FIVE HUNDRED FIFTY-FIVE THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
5.00%	February 1, 2034	041609 3B2	February 27, 2025
PRINCIPAL AMOUNT:	FIVE HUNDRED FIFTY-FIVE THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2035	041609 3C0	February 27, 2025
PRINCIPAL AMOUNT:	FIVE HUNDRED FIFTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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\$345,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2036	041609 3D8	February 27, 2025

PRINCIPAL AMOUNT: THREE HUNDRED FORTY-FIVE THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND

PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

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R-12

\$350,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2037	041609 3E6	February 27, 2025
PRINCIPAL AMOUNT:	THREE HUNDRED FIFTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2038	041609 3F3	February 27, 2025
PRINCIPAL AMOUNT:	THREE HUNDRED FIFTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2039	041609 3G1	February 27, 2025
PRINCIPAL AMOUNT:	THREE HUNDRED FIFTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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\$355,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2040	041609 3H9	February 27, 2025

PRINCIPAL AMOUNT: THREE HUNDRED FIFTY-FIVE THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2041	041609 3J5	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED FIFTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

The Town of Arlington, Massachusetts (the “Town”), for value received, promises to pay to the Registered Owner of this bond or registered assigns the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date unless this bond is called for earlier redemption, upon presentation and surrender hereof, with interest (calculated on the basis of a 360-day year of twelve 30-day months) at the Interest Rate per annum, payable on August 1, 2025 and semiannually thereafter on February 1 and August 1 of each year (each, an “Interest Payment Date”) until the Principal Amount is paid or has been duly provided for. This bond will bear interest from the most recent Interest Payment Date to which interest has been paid or, if no interest has been paid, from the Original Issue Date. The record date for the payment of interest on this Bond (the “Record Date”) shall be the fifteenth day of the month preceding an interest payment date. If such date is not a business day, the Record Date shall be the next succeeding business day.

This bond is one of an issue of \$11,355,000 aggregate principal amount issued by the Town pursuant to Chapters 44 and 70B of the General Laws as amended for school building improvement, municipal building improvement, departmental equipment, and recreation improvement purposes. The bonds are issuable only in fully registered form in the denomination of five thousand dollars (\$5,000) or any integral multiple thereof.

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2042	041609 3K2	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED FIFTY-FIVE THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2043	041609 3L0	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED SIXTY-FIVE THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America
The Commonwealth of Massachusetts
TOWN OF ARLINGTON
GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2044	041609 3M8	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED SEVENTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2045	041609 3N6	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED EIGHTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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R-21

\$1,520,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2051	041609 3U0	February 27, 2025

PRINCIPAL AMOUNT: ONE MILLION FIVE HUNDRED TWENTY THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

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R-22

\$265,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2052	041609 3V8	February 27, 2025

PRINCIPAL AMOUNT: TWO HUNDRED SIXTY-FIVE THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

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R-23

\$280,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2053	041609 3W6	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED EIGHTY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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R-24

\$290,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2054	041609 3X4	February 27, 2025
PRINCIPAL AMOUNT:	TWO HUNDRED NINETY THOUSAND DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRATION DATE:	FEBRUARY 27, 2025		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

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R-25

\$300,000

United States of America

The Commonwealth of Massachusetts

TOWN OF ARLINGTON

GENERAL OBLIGATION
MUNICIPAL PURPOSE LOAN OF 2024 BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>CUSIP</u>	<u>Original Issue Date</u>
4.00%	February 1, 2055	041609 3Y2	February 27, 2025

PRINCIPAL AMOUNT: THREE HUNDRED THOUSAND DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRATION DATE: FEBRUARY 27, 2025

REGISTRAR AND

PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

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(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

Town of Arlington, Massachusetts

\$11,355,000

General Obligation Municipal Purpose Loan of 2025 Bonds
dated February 27, 2025

SIGNATURE, NO LITIGATION AND OFFICIAL STATEMENT CERTIFICATE

A. Certificate of Authorized Officers. We, the members of the Select Board and the Treasurer of the Town of Arlington, Massachusetts (the “Town”), certify that we have signed each of the \$11,355,000 General Obligation Municipal Purpose Loan of 2025 Bonds (the “Bonds”) of the Town dated February 27, 2025, payable February 1 of the years and in the principal amounts, and bearing interest at the respective rates as follows:

<u>Year</u>	<u>Amount</u>	<u>Interest Rate</u>	<u>Year</u>	<u>Amount</u>	<u>Interest Rate</u>
2026	\$235,000	5.00%	2039	\$350,000	4.00%
2027	640,000	5.00	2040	355,000	4.00
2028	645,000	5.00	2041	250,000	4.00
2029	640,000	5.00	2042	255,000	4.00
2030	640,000	5.00	2043	265,000	4.00
2031	590,000	5.00	2044	270,000	4.00
2032	580,000	5.00	2045	280,000	4.00
2033	555,000	5.00	2051	1,520,000	4.00
2034	555,000	5.00	2052	265,000	4.00
2035	550,000	4.00	2053	280,000	4.00
2036	345,000	4.00	2054	290,000	4.00
2037	350,000	4.00	2055	300,000	4.00
2038	350,000	4.00			

The Bonds maturing on February 1, 2051 (the “Term Bond”) shall be subject to mandatory redemption or mature as follows:

Term Bond due February 1, 2051

<u>Date</u>	<u>Principal Amount</u>
February 1, 2046	\$235,000
February 1, 2047	245,000
February 1, 2048	255,000
February 1, 2049	265,000
February 1, 2050	265,000
February 1, 2051 (maturity)	255,000

The Bonds shall be subject to redemption, at the option of the Town, upon such terms and conditions as are set forth in the Official Statement prepared in connection with the Bonds dated February 5, 2025 (the “Official Statement”).

A book entry system is being used to evidence ownership and transfer of the Bonds on the records of The Depository Trust Company (“DTC”). The Bonds are registered in the name of “CEDE & CO.” as nominee for DTC and immobilized in the custody of DTC. All of the Bonds are similar in form and similarly executed, and each Bond bears (either by impression or in facsimile) the Town seal, which is also affixed to this certificate.

We, the said officers, also certify as follows:

1. Authority. The Bonds¹ are issued pursuant to a vote of the Select Board adopted at a meeting duly called and held on February 12, 2025 and the following statutes and votes of the Town:

- (a) \$5,395,000 - \$290,851,820 School Project Loan, Chapter 70B Bonds under G.L. c.70B and a vote of the Town passed April 29, 2019 (Article 1), excluded from the limitations of Proposition 2 ½, so-called, on June 11, 2019 (Question 1);
- (b) \$800,000 - \$800,000 Bracket School Playground Renovation Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 11);
- (c) \$232,000 - \$750,000 Solid Waste Trash and Recycling Toter Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 2);
- (d) \$725,000 - \$725,000 Robbins Library Renovation Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 1);

¹See Paragraph A(2) below for the amount of bond premium which will be applied to reduce the borrowing authority under certain of the town meeting votes.

- (e) \$600,000 - \$600,000 Parallel Park Improvement Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 5);
- (f) \$600,000 - \$600,000 Hardy School Roof Replacement Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 13);
- (g) \$500,000 - \$500,000 Bishop School Envelope Renovation Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 9);
- (h) \$350,000 - \$350,000 Bishop School Front Office Renovation Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 8);
- (i) \$348,000 - \$348,000 Bishop School Solar Array Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 14);
- (j) \$300,000 - \$400,000 Stratton School Main Lobby Renovation and Office Addition Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 15);
- (k) \$300,000 - \$300,000 School Fire Alarm Upgrade Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 6);
- (l) \$300,000 - \$300,000 School Rooftop HVAC Units Upgrade Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 7);
- (m) \$250,000 - \$250,000 Gibbs School Additional Classrooms Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 12);
- (n) \$230,000 - \$230,000 Four Wheel Truck with Dump Body Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 4);
- (o) \$150,000 - \$150,000 Brackett School Exterior Door Replacement Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 10);
- (p) \$150,000 - \$150,000 Student Transportation Vehicle Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 16); and

- (q) \$125,000 - \$125,000 Dump Truck with Plow/Sander Bonds under G.L. c.44, §7(1) and a vote of the Town passed May 6, 2024 (Article 40, Item 3).

2. Description and Purpose of Bonds. The Town is issuing and delivering the Bonds simultaneously with the delivery of this certificate. The following amounts of the issue are for the following purposes:

	<u>Principal</u>	<u>Premium</u> ²	<u>Total Amount of Proceeds</u>	<u>Purpose</u>
(a)	\$5,395,000	\$105,000	\$5,500,000	Demolishing, designing, constructing or re-constructing and originally equipping of Arlington High School;
(b)	\$800,000	\$0	\$800,000	Brackett School playground renovation;
(c)	\$232,000	\$518,000	\$750,000	Solid waste trash and recycling toters;
(d)	\$725,000	\$0	\$725,000	Robbins Library – main entry masonry renovation;
(e)	\$600,000	\$0	\$600,000	Parallel Park improvements;
(f)	\$600,000	\$0	\$600,000	Hardy School roof replacement;
(g)	\$500,000	\$0	\$500,000	Bishop School envelope - windows and masonry
(h)	\$350,000	\$0	\$350,000	Bishop School front office reconfiguration;
(i)	\$348,000	\$0	\$348,000	Bishop School solar array;
(j)	\$300,000	\$0	\$300,000	Stratton School main lobby renovation and office additions;
(k)	\$300,000	\$0	\$300,000	School fire alarm upgrade;

²\$623,000 of the premium received by the Town in connection with the sale of the Bonds has been allocated to project costs pursuant to G.L. c.44, §20, as amended, and the amount authorized to be borrowed for each project has been reduced accordingly. The remaining unallocated premium on the Bonds will be applied or appropriated in accordance with G.L. c.44, §20.

	<u>Principal</u>	<u>Premium</u> ²	<u>Total Amount of Proceeds</u>	<u>Purpose</u>
(l)	\$300,000	\$0	\$300,000	School roof top units HVAC upgrade;
(m)	\$250,000	\$0	\$250,000	Gibbs School additional classrooms;
(n)	\$230,000	\$0	\$230,000	44,000 lb GWV 4WD truck with dump body;
(o)	\$150,000	\$0	\$150,000	Brackett School exterior door replacement;
(p)	\$150,000	\$0	\$150,000	Student transportation vehicle replacement program; and
(q)	\$125,000	\$0	\$125,000	One ton dump truck with plow sander.

3. Other Debt. No other debt has been incurred under those votes except for the following bonds:

- (a) \$56,672,392 bonds and premium dated December 4, 2019; \$55,000,000 bonds and premium dated March 11, 2021; \$75,000,000 bonds and premium dated February 24, 2022; and \$10,000,000 bonds and premium dated December 13, 2023; and
- (b) – (q) None.

4. Maturity Schedule. The Bonds constitute a consolidated issue for purposes of G.L. c.44, §16 of the General Laws. Each component of the Bonds matures at such times and in such amounts as set forth in Appendix A attached hereto.

5. School Building Assistance Grant. On or before the date hereof, the Town received a grant in the maximum aggregate amount of \$84,700,343 from the Massachusetts School Building Authority for the school project being financed in part with the proceeds of the \$5,395,000 portion of the Bonds referred to in Paragraph A(1)(a) above and has received \$72,538,612 on account of such grant as of the date hereof.

6. Approval of Sale. We approve the sale of the Bonds to Fidelity Capital Markets, a division of National Financial Services LLC (the “Purchaser”) at par and accrued interest, if any, plus a premium of \$725,034.30.

B. Delivery and Receipt. I, the Treasurer, certify that the Bonds were delivered on this date and that the full purchase price including accrued interest for the period, if any, from the date of the Bonds to this date was received from the Purchaser on this date.

C. Certificate as to Official Statement. I, the Town Treasurer, certify as follows:

(a) I have reviewed the Preliminary Official Statement dated January 29, 2025 (the "Preliminary Official Statement") and the Official Statement relating to the sale of the Bonds.

(b) To the best of my knowledge and belief, the Preliminary Official Statement (excluding Appendices B and C, as to which no view is expressed) did not, as of its date and as of the date of sale of the Bonds, and the Official Statement (excluding the prices or yields on the cover page, and Appendices B and C, as to which no view is expressed) did not as of its date and does not as of this date (which is the date of delivery of the Bonds), contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made therein, in the light of the circumstances under which they were made, not misleading.

(c) Since the date of the Official Statement there has been no material adverse change in the financial condition or affairs of the Town except as set forth in or contemplated by the Official Statement.

D. Debt Limit. I, the Treasurer, certify that at the time of their authorization, the Bonds were, and on the date hereof are, within every applicable debt and other limit prescribed by law or otherwise.

E. Certificate of Town Clerk. I, the Town Clerk, certify as follows:

(a) Signatures and Incumbency. The signatures of the Treasurer and the members of the Select Board as appearing below are the genuine signatures of the persons who executed the Bonds and who held those offices when the Bonds were executed and when the Bonds were delivered.

(b) Open Meeting Law. Except for the town meetings called pursuant to G.L. c.39, §10, all proceedings essential to the authorization and issue of the Bonds and deliberations of a quorum relating thereto have been taken at a meeting or meetings open to the public; notice of each such meeting was filed in my office and publicly posted in the time and manner set forth in G.L. c.30A, §§18-25, as amended, or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b); no deliberations, decision or vote in connection with the Bonds were taken in executive session and no vote was taken by secret ballot; and the official record of each such meeting was made available to the public and remains available to the public as set forth in G.L. c.30A, §§18-25, as amended.

(c) Proceedings. No proceeding essential to the issue of the Bonds has been repealed or amended except as stated in Paragraph A(1) above, and no proceedings have been taken relating to the Bonds other than those certified to Troutman Pepper Locke LLP.

(d) Bylaws. The bylaws described below are the only bylaws or standing votes of the Town affecting the authorization, sale or issue of the Bonds, including the calling and conduct of town meetings, or the use of assessments or other charges imposed to pay for any project financed by the Bonds, and there has been no change therein affecting those matters in any way except as may be indicated below:

By-Laws of the Town of Arlington, Massachusetts as amended to April, 2012 and certified to Troutman Pepper Locke LLP on January 28, 2025.

(e) Home Rule. The Town has not adopted a home rule charter and the Town has not amended or repealed any special law relating to the Town through the use of home rule procedures.

(f) Development Districts. The Town has not established any development districts pursuant to G.L. c.40Q.

F. Repayment Schedule. We, the Treasurer and the members of the Select Board certify that the maturities of each component of the Bonds, in our opinion, are arranged so that the amounts payable in the several years for principal and interest combined are as nearly equal as practicable or are in accordance with a schedule providing a more rapid amortization of principal.

G. Execution of Counterparts and Delivery by Electronic Means. This certificate, as well as any other certificates or documents relating to the Bonds (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

[Remainder of page intentionally left blank; signature page follows.]

H. No Litigation; No Financial Interest. All of the undersigned certify that there has been no litigation affecting the validity of the Bonds or the power of the Town to levy and collect taxes to pay them; that none is pending or to our knowledge threatened; that neither the corporate existence nor boundaries of the Town nor the title of any of us to our respective offices is being contested; and that none of us and, to the best of our knowledge, no other official of the Town has any direct or indirect financial interest in or relationship with the Purchaser.

Dated: February 27, 2025
(Date of delivery of and
payment for the Bonds)

Select Board

Treasurer

Town Clerk

(Town Seal)

APPENDIX A

Maturity by Purpose Schedule

Town of Arlington, Massachusetts
General Obligation Municipal Purpose Loan of 2025 Bonds dated February 27, 2025

Maturity Date	Robbins Library Main Entry Masonry Renovation	Solid Waste Trash & Recycling Toters	1 Ton Dump Truck w/ Plow Sander	44,000 lb GWV 4WD Truck w/ Dump Body	Parallel Park	School Fire Alarm Upgrade	School Roof Top Units HVAC Upgrade	Bishop School Front Office Reconfiguration	Bishop School Envelope - Windows & Masonry	Brackett School Exterior Door Replacement	Brackett School Playground Renovation	Gibbs School Additional Classrooms	Hardy School Roof Replacement	Bishop School Solar Array
02/01/2026	5,000	37,000	5,000	10,000	5,000	5,000	5,000	5,000	10,000	5,000	5,000	5,000	5,000	8,000
02/01/2027	40,000	50,000	15,000	25,000	45,000	35,000	35,000	40,000	55,000	20,000	60,000	30,000	25,000	25,000
02/01/2028	40,000	50,000	15,000	25,000	45,000	35,000	35,000	40,000	55,000	20,000	60,000	30,000	25,000	25,000
02/01/2029	40,000	50,000	15,000	25,000	45,000	35,000	35,000	40,000	55,000	15,000	60,000	30,000	25,000	25,000
02/01/2030	40,000	45,000	15,000	25,000	45,000	35,000	35,000	40,000	55,000	15,000	60,000	30,000	25,000	25,000
02/01/2031	40,000	-	15,000	25,000	45,000	35,000	35,000	40,000	55,000	15,000	60,000	25,000	25,000	25,000
02/01/2032	40,000	-	15,000	25,000	45,000	30,000	30,000	40,000	55,000	15,000	55,000	25,000	25,000	25,000
02/01/2033	40,000	-	10,000	25,000	45,000	30,000	30,000	35,000	55,000	15,000	55,000	25,000	25,000	25,000
02/01/2034	40,000	-	10,000	25,000	40,000	30,000	30,000	35,000	55,000	15,000	55,000	25,000	25,000	25,000
02/01/2035	40,000	-	10,000	20,000	40,000	30,000	30,000	35,000	50,000	15,000	55,000	25,000	25,000	25,000
02/01/2036	40,000	-	-	-	40,000	-	-	-	-	-	55,000	-	25,000	25,000
02/01/2037	40,000	-	-	-	40,000	-	-	-	-	-	55,000	-	25,000	25,000
02/01/2038	35,000	-	-	-	40,000	-	-	-	-	-	55,000	-	25,000	25,000
02/01/2039	35,000	-	-	-	40,000	-	-	-	-	-	55,000	-	25,000	20,000
02/01/2040	35,000	-	-	-	40,000	-	-	-	-	-	55,000	-	25,000	20,000
02/01/2041	35,000	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2042	35,000	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2043	35,000	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2044	35,000	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2045	35,000	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2046	-	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2047	-	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2048	-	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2049	-	-	-	-	-	-	-	-	-	-	-	-	25,000	-
02/01/2050	-	-	-	-	-	-	-	-	-	-	-	-	20,000	-
02/01/2051	-	-	-	-	-	-	-	-	-	-	-	-	-	-
02/01/2052	-	-	-	-	-	-	-	-	-	-	-	-	-	-
02/01/2053	-	-	-	-	-	-	-	-	-	-	-	-	-	-
02/01/2054	-	-	-	-	-	-	-	-	-	-	-	-	-	-
02/01/2055	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	725,000	232,000	125,000	230,000	600,000	300,000	300,000	350,000	500,000	150,000	800,000	250,000	600,000	348,000

BOND MATURITY TABLE

Town of Arlington, Massachusetts General Obligation Municipal Purpose Loan of 2025 Bonds dated February 27, 2025

Maturity Date	Stratton School Main Lobby Renovation & Office Additions	Student Transportation Vehicle Replacement Program	High School (Exempt)	Total
02/01/2026	5,000	10,000	105,000	235,000
02/01/2027	20,000	25,000	95,000	640,000
02/01/2028	20,000	25,000	100,000	645,000
02/01/2029	15,000	25,000	105,000	640,000
02/01/2030	15,000	25,000	110,000	640,000
02/01/2031	15,000	20,000	115,000	590,000
02/01/2032	15,000	20,000	120,000	580,000
02/01/2033	15,000	-	125,000	555,000
02/01/2034	15,000	-	130,000	555,000
02/01/2035	15,000	-	135,000	550,000
02/01/2036	15,000	-	145,000	345,000
02/01/2037	15,000	-	150,000	350,000
02/01/2038	15,000	-	155,000	350,000
02/01/2039	15,000	-	160,000	350,000
02/01/2040	15,000	-	165,000	355,000
02/01/2041	15,000	-	175,000	250,000
02/01/2042	15,000	-	180,000	255,000
02/01/2043	15,000	-	190,000	265,000
02/01/2044	15,000	-	195,000	270,000
02/01/2045	15,000	-	205,000	280,000
02/01/2046	-	-	210,000	235,000
02/01/2047	-	-	220,000	245,000
02/01/2048	-	-	230,000	255,000
02/01/2049	-	-	240,000	265,000
02/01/2050	-	-	245,000	265,000
02/01/2051	-	-	255,000	255,000
02/01/2052	-	-	265,000	265,000
02/01/2053	-	-	280,000	280,000
02/01/2054	-	-	290,000	290,000
02/01/2055	-	-	300,000	300,000
	300,000	150,000	5,395,000	11,355,000

(Please Note: The following certificate is an essential part of the permanent record and creates ongoing obligations of the Issuer. Please read it carefully before signing. Advise Troutman Pepper Locke LLP of any inaccuracy.)

CONTINUING DISCLOSURE CERTIFICATE

This Continuing Disclosure Certificate (the “Disclosure Certificate”) is executed and delivered by the Town of Arlington, Massachusetts (the “Issuer”) in connection with the issuance of its \$11,355,000 General Obligation Municipal Purpose Loan of 2025 Bonds dated February 27, 2025 (the “Bonds”). The Issuer covenants and agrees as follows:

SECTION 1. Purpose of the Disclosure Certificate. This Disclosure Certificate is being executed and delivered by the Issuer for the benefit of the Owners of the Bonds and in order to assist the Participating Underwriters in complying with the Rule.

SECTION 2. Definitions. For purposes of this Disclosure Certificate the following capitalized terms shall have the following meanings:

“Annual Report” shall mean any Annual Report provided by the Issuer pursuant to, and as described in, Sections 3 and 4 of this Disclosure Certificate.

“Listed Events” shall mean any of the events listed in Section 5(a) of this Disclosure Certificate.

“MSRB” shall mean the Municipal Securities Rulemaking Board as established pursuant to Section 15B(b)(1) of the Securities Exchange Act of 1934, or any successor thereto or to the functions of the MSRB contemplated by this Disclosure Certificate. Filing information relating to the MSRB is set forth in Exhibit A attached hereto.

“Obligated Person” shall mean the Issuer.

“Owners of the Bonds” shall mean the registered owners, including beneficial owners, of the Bonds.

“Participating Underwriter” shall mean any of the original underwriters of the Bonds required to comply with the Rule in connection with offering of the Bonds.

“Rule” shall mean Rule 15c2-12 adopted by the Securities and Exchange Commission under the Securities Exchange Act of 1934, as the same may be amended from time to time.

SECTION 3. Provision of Annual Reports.

(a) The Issuer shall, not later than 270 days after the end of each fiscal year, provide to the MSRB an Annual Report which is consistent with the requirements of Section 4 of this Disclosure Certificate. The Annual Report may be submitted as a single document or as separate documents comprising a package, and may cross-reference other information as provided in Section 4 of this Disclosure Certificate; provided that the audited financial statements of the Issuer may be submitted when available separately from the balance of the Annual Report.

(b) If the Issuer is unable to provide to the MSRB an Annual Report by the date required in subsection (a), the Issuer shall send a notice to the MSRB in a timely manner, in substantially the form attached as Exhibit B.

SECTION 4. Content of Annual Reports. The Issuer's Annual Report shall contain or incorporate by reference the following:

(a) quantitative information for the preceding fiscal year of the type presented in the Issuer's Official Statement dated February 5, 2025 relating to the Bonds regarding (i) the revenues and expenditures of the Issuer relating to its operating budget, (ii) capital expenditures, (iii) fund balances, (iv) property tax information, (v) outstanding indebtedness and overlapping debt of the Issuer, (vi) pension obligations of the Issuer, and (vii) other post-employment benefits liability of the Issuer, and

(b) the most recently available audited financial statements of the Issuer, prepared in accordance with generally accepted accounting principles, with certain exceptions permitted by the Massachusetts Uniform Municipal Accounting System promulgated by the Department of Revenue of the Commonwealth. If audited financial statements for the preceding fiscal year are not available when the Annual Report is submitted, the Annual Report will include unaudited financial statements for the preceding fiscal year and audited financial statements for such fiscal year shall be submitted when available.

Any or all of the items listed above may be incorporated by reference from other documents, including official statements of debt issues of the Issuer or related public entities, which (i) are available to the public on the MSRB internet website or (ii) have been filed with the Securities and Exchange Commission. The Issuer shall clearly identify each such other document so incorporated by reference.

SECTION 5. Reporting of Significant Events.

(a) The Issuer shall give notice, in accordance with the provisions of this Section 5, of the occurrence of any of the following events with respect to the Bonds:

1. Principal and interest payment delinquencies.
2. Non-payment related defaults, if material.
3. Unscheduled draws on debt service reserves reflecting financial difficulties.
4. Unscheduled draws on credit enhancements reflecting financial difficulties.
5. Substitution of credit or liquidity providers, or their failure to perform.
6. Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices or determinations with respect to the tax status of the Bonds, or other material events affecting the tax status of the Bonds.

7. Modifications to rights of the Owners of the Bonds, if material.
 8. Bond calls, if material, and tender offers.
 9. Defeasances.
 10. Release, substitution or sale of property securing repayment of the Bonds, if material.
 11. Rating changes.
 12. Bankruptcy, insolvency, receivership or similar event of the Obligated Person.*
 13. The consummation of a merger, consolidation, or acquisition involving an Obligated Person or the sale of all or substantially all of the assets of the Obligated Person, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms, if material.
 14. Appointment of a successor or additional trustee or the change of name of a trustee, if material.
 15. Incurrence of a financial obligation of the Obligated Person, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the Obligated Person, any of which affect Owners of the Bonds, if material.†
 16. Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the Obligated Person, any of which reflect financial difficulties.†
- (b) Upon the occurrence of a Listed Event, the Issuer shall, in a timely manner not in excess of ten (10) business days after the occurrence of the event, file a notice of such occurrence with the MSRB.

* As noted in the Rule, this event is considered to occur when any of the following occur: (i) the appointment of a receiver, fiscal agent or similar officer for the Obligated Person in a proceeding under the U.S. Bankruptcy Code or in any proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of the Obligated Person, or if such jurisdiction has been assumed by leaving the existing governing body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or (ii) the entry of an order confirming a plan of reorganization, arrangement or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the Obligated Person.

† For purposes of event numbers 15 and 16 in Section 5(a) of this Disclosure Certificate, the term “financial obligation” means a (i) debt obligation; (ii) derivative instrument entered into in connection with, or pledged as security or a source of payment for, an existing or planned debt obligation; or (iii) guarantee of (i) or (ii). The term “financial obligation” excludes municipal securities for which a final official statement has been provided to the MSRB consistent with the Rule.

SECTION 6. Transmission of Information and Notices. Unless otherwise required by law, all notices, documents and information provided to the MSRB shall be provided in electronic format as prescribed by the MSRB and shall be accompanied by identifying information as prescribed by the MSRB.

SECTION 7. Termination of Reporting Obligation. The Issuer's obligations under this Disclosure Certificate shall terminate upon the prior redemption or payment in full of all of the Bonds. If such termination occurs prior to the final maturity of the Bonds, the Issuer shall give notice of such termination in the same manner as for a Listed Event under Section 5(b).

SECTION 8. Amendment; Waiver. Notwithstanding any other provision of this Disclosure Certificate, the Issuer may amend this Disclosure Certificate and any provision of this Disclosure Certificate may be waived if such amendment or waiver is permitted by the Rule, as evidenced by an opinion of counsel expert in federal securities law (which may include bond counsel to the Issuer), to the effect that such amendment or waiver would not cause the Disclosure Certificate to violate the Rule. The first Annual Report filed after enactment of any amendment to or waiver of this Disclosure Certificate shall explain, in narrative form, the reasons for the amendment or waiver and the impact of the change in the type of information being provided in the Annual Report.

If the amendment provides for a change in the accounting principles to be followed in preparing financial statements, the Annual Report for the year in which the change is made shall present a comparison between the financial statements or information prepared on the basis of the new accounting principles and those prepared on the basis of the former accounting principles. The comparison shall include a qualitative discussion of the differences in the accounting principles and the impact of the change in the accounting principles on the presentation of the financial information in order to provide information to investors to enable them to evaluate the ability of the Issuer to meet its obligations. To the extent reasonably feasible, the comparison shall also be quantitative. A notice of the change in the accounting principles shall be sent to the MSRB.

SECTION 9. Default. In the event of a failure of the Issuer to comply with any provision of this Disclosure Certificate any Owner of the Bonds may seek a court order for specific performance by the Issuer of its obligations under this Disclosure Certificate. A default under this Disclosure Certificate shall not constitute a default with respect to the Bonds, and the sole remedy under this Disclosure Certificate in the event of any failure of the Issuer to comply with this Disclosure Certificate shall be an action for specific performance of the Issuer's obligations hereunder and not for money damages in any amount.

[Remainder of page intentionally left blank; signature page follows.]

SECTION 10. Beneficiaries. This Disclosure Certificate shall inure solely to the benefit of the Owners of the Bonds from time to time, and shall create no rights in any other person or entity.

Date: February 27, 2025

TOWN OF ARLINGTON,
MASSACHUSETTS

By: _____
Treasurer

Select Board

EXHIBIT A

Filing information relating to the Municipal Securities Rulemaking Board is as follows:

Municipal Securities Rulemaking Board
<http://emma.msrb.org>

EXHIBIT B

NOTICE OF FAILURE TO FILE ANNUAL REPORT

Name of Issuer: Town of Arlington, Massachusetts

Name of Issue: \$11,355,000 General Obligation Municipal Purpose Loan of 2025 Bonds

Date of Issuance: February 27, 2025

NOTICE IS HEREBY GIVEN that the Issuer has not provided an Annual Report with respect to the above-named Bonds as required by the Continuing Disclosure Certificate of the Issuer dated February 27, 2025. The Issuer anticipates that the Annual Report will be filed by

_____.

Dated: _____

TOWN OF ARLINGTON,
MASSACHUSETTS

By: _____

VOTE OF THE SELECT BOARD

I, the Clerk of the Select Board of the Town of Arlington, Massachusetts (the “Town”), certify that at a meeting of the board held February 12, 2025, of which meeting all members of the board were duly notified and at which a quorum was present, the following votes were unanimously passed, all of which appear upon the official record of the board in my custody:

Voted: we hereby determine, in accordance with G.L. c.70B, that the cost of the high school construction project authorized by vote of the Town passed on April 29, 2019 (Article 1) being financed with proceeds of a portion of the Bonds defined below, together with all other bonds and notes of the Town previously issued to pay costs of this project, does not exceed the portion of the total cost of the project that is not being paid by the school facilities grant and we hereby approve the issuance of notes and bonds to finance this project under G.L. c.70B.

Further Voted: that the maximum useful life of the departmental equipment listed below to be financed with the proceeds of borrowing authorized by the vote of the Town passed May 6, 2024 (Article 40, Items 2, 3, 4, 14 and 16) is hereby determined pursuant to G.L. c.44, §7(1) to be as follows:

<u>Purpose</u>	<u>Borrowing Amount</u>	<u>Maximum Useful Life</u>
Solid Waste Trash & Recycling Toters	\$750,000	5
1 Ton Dump Truck with Plow Sander	\$125,000	10
44,000 lb GWV 4WD Truck w/Dump Body	\$230,000	10
Bishop School Solar Array	\$348,000	15
Student Transportation Vehicle Replacement	\$150,000	7

Further Voted: that the sale of the \$11,355,000 General Obligation Municipal Purpose Loan of 2025 Bonds of the Town dated February 27, 2025 (the “Bonds”), to Fidelity Capital Markets, a division of National Financial Services LLC at the price of \$12,080,034.30 and accrued interest, if any, is hereby approved and confirmed. The Bonds shall be payable on February 1 of the years and in the principal amounts and bear interest at the respective rates, as follows:

<u>Year</u>	<u>Amount</u>	<u>Interest Rate</u>	<u>Year</u>	<u>Amount</u>	<u>Interest Rate</u>
2026	\$235,000	5.00%	2039	\$350,000	4.00%
2027	640,000	5.00	2040	355,000	4.00
2028	645,000	5.00	2041	250,000	4.00
2029	640,000	5.00	2042	255,000	4.00
2030	640,000	5.00	2043	265,000	4.00
2031	590,000	5.00	2044	270,000	4.00
2032	580,000	5.00	2045	280,000	4.00
2033	555,000	5.00	2051	1,520,000	4.00
2034	555,000	5.00	2052	265,000	4.00
2035	550,000	4.00	2053	280,000	4.00
2036	345,000	4.00	2054	290,000	4.00
2037	350,000	4.00	2055	300,000	4.00
2038	350,000	4.00			

Further Voted: that the Bonds maturing on February 1, 2051 (a “Term Bond”) shall be subject to mandatory redemption or mature as follows:

Term Bond due February 1, 2051

<u>Date</u>	<u>Principal Amount</u>
February 1, 2046	\$235,000
February 1, 2047	245,000
February 1, 2048	255,000
February 1, 2049	265,000
February 1, 2050	265,000
February 1, 2051 (maturity)	255,000

Further Voted: that in connection with the marketing and sale of the Bonds, the preparation and distribution of a Notice of Sale and Preliminary Official Statement dated January 29, 2025, and a final Official Statement dated February 5, 2025 (the “Official Statement”), each in such form as may be approved by the Town Treasurer, be and hereby are ratified, confirmed, approved and adopted.

Further Voted: that the Bonds shall be subject to redemption, at the option of the Town, upon such terms and conditions as are set forth in the Official Statement.

Further Voted: that the Town Treasurer and the Select Board be, and hereby are, authorized to execute and deliver a continuing disclosure undertaking in compliance with SEC Rule 15c2-12 in such form as may be approved by bond counsel to the Town, which undertaking shall be incorporated by reference in the Bonds for the benefit of the holders of the Bonds from time to time.

Further Voted: that we authorize and direct the Town Treasurer to establish post issuance federal tax compliance procedures and continuing disclosure procedures in such forms as the Town Treasurer and bond counsel deem sufficient, or if such procedures are

currently in place, to review and update said procedures, in order to monitor and maintain the tax-exempt status of the Bonds and to comply with relevant securities laws.

Further Voted: that any certificates or documents relating to the Bonds (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Further Voted: that each member of the Select Board, the Town Clerk and the Town Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing votes.

[Remainder of page intentionally left blank; signature page follows.]

I further certify that the votes were taken at a meeting open to the public, that no vote was taken by secret ballot, that a notice stating the place, date, time and agenda for the meeting (which agenda included the adoption of the above votes) was filed with the Town Clerk and a copy thereof posted in a manner conspicuously visible to the public at all hours in or on the municipal building that the office of the Town Clerk is located or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b), at least 48 hours, not including Saturdays, Sundays and legal holidays, prior to the time of the meeting and remained so posted at the time of the meeting, that no deliberations or decision in connection with the sale of the Bonds were taken in executive session, all in accordance with G.L. c.30A, §§18-25, as amended.

Dated: February 12, 2025

Clerk of the Select Board

(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

TAX CERTIFICATE

This Tax Certificate is executed and delivered by the Town of Arlington, Massachusetts (“Issuer”), in connection with the issuance of \$11,355,000 stated principal amount of its General Obligation Municipal Purpose Loan of 2025 Bonds dated the Issue Date (“Issue”). The Issue is issued pursuant to Votes duly adopted by the Issuer and the Massachusetts General Laws. Pursuant to Reg §§ 1.141-2(d)(1) and 1.148-2(b)(2)(i), the Issuer certifies, covenants, warrants and represents as follows in connection with the issuance of the Issue:

ARTICLE I. IN GENERAL

1.1 Delivery of the Bonds of the Issue. On the Issue Date, in exchange for receipt of good funds, the Issuer is delivering the bonds of the Issue to the Successful Bidder, for resale to the Public.

1.2 Purpose of Tax Certificate. The Issuer is delivering this Tax Certificate to Bond Counsel, with the understanding that Bond Counsel will rely in part upon this Tax Certificate in rendering its opinion that interest on the Issue is excluded from gross income for federal income tax purposes under Section 103.

1.3 Definitions and References. All capitalized terms used in this Tax Certificate include either the singular or the plural. All terms used in this Tax Certificate, including terms specifically defined, shall be interpreted in a manner consistent with Sections 103 and 141-150 and the applicable Regulations thereunder except as otherwise specified. Capitalized terms used and not otherwise defined herein and in the exhibits hereto and in the schedules and attachments to those exhibits shall have the respective meanings set forth in Appendix A and Appendix B hereto. Reference to a Section means a section of the Code. Reference by number only (for example, “2.10”) means that numbered paragraph of this Tax Certificate.

1.4 Purpose of Financing. The Issue is being issued to provide funds (i) to finance on a “new money” basis the capital costs of certain municipal projects as more fully described in the Signature Certificate, including the payment of Capitalized Interest, if any (“Projects”), and Funded Interest, if any, and (ii) to pay Issuance Costs and other common costs of the Issue.

1.5 Single Issue. The bonds of the Issue were sold to the Successful Bidder on the Sale Date. No other governmental obligations of the Issuer which are expected to be paid out of substantially the same source of funds as the Issue have been or will be sold less than 15 days apart from the Sale Date pursuant to the same plan of financing as the Issue.

1.6 Reliance. With respect to certain matters contained in this Tax Certificate, the Issuer specifically relies upon the certifications of the Successful Bidder set forth in Exhibit A, the certifications of the Municipal Advisor set forth in Exhibit B, and upon the certifications set forth in the other exhibits attached hereto or as otherwise described herein. The Issuer is not

aware of any facts or circumstances that would cause it to question the accuracy or reasonableness of any representation made in this Tax Certificate including the exhibits hereto.

ARTICLE II. GENERAL TAX LIMITATIONS

2.1 Application of Sale Proceeds and Certain Other Moneys. On the Issue Date, the Sale Proceeds, \$12,107,127.00, less an underwriter's discount of \$27,092.70, will be deposited to the General Fund and applied as follows:

Projects	\$11,978,000.00
Issuance Costs	98,307.00
Payment of a portion of the interest on the Issue due August 1, 2025	<u>3,727.30</u>
TOTAL:	\$12,080,034.30

Investment Proceeds earned on the amounts in the General Fund will be commingled with other revenues of the Issuer, and are expected to be expended for operating or other expenses of the Issuer within six months after deposit of the Investment Proceeds therein. Pursuant to Reg § 1.148-6(d)(6), all such Investment Proceeds will be treated as expended when so commingled.

2.2 Expenditure of Gross Proceeds. For purposes of this Tax Certificate, Sale Proceeds and, to the extent not deemed expended as described in 2.1, Investment Proceeds will be treated as spent when they are used to pay or reimburse disbursements by the Issuer that are (i) capital expenditures, including any Capitalized Interest, if any and to the extent allowable, (ii) Issuance Costs, (iii) Funded Interest, (iv) initial operating expenses directly associated with the Projects (in an aggregate amount not exceeding 5% of the Sale Proceeds), or (v) other miscellaneous expenditures described in Reg § 1.148-6(d)(3)(ii).

The Issuer hereby certifies that no disbursement to be paid or reimbursed from Gross Proceeds shall have been previously paid or reimbursed from the proceeds of any other obligation, whether issued by the Issuer or any other party.

To the extent that Sale Proceeds will be applied to reimburse expenditures made by the Issuer prior to the Issue Date, the Issuer hereby certifies that such expenditures either (i) constitute capital expenditures incurred not earlier than 60 days prior to the applicable Vote, which Votes constitute the Issuer's declarations of official intent to issue debt to finance the costs of the Projects, or (ii) constitute Preliminary Expenditures to the extent permitted by Massachusetts law.

The Issuer further certifies that any such reimbursement described in clause (i) of the preceding sentence shall be made not later than 18 months after the later of the date of the expenditure or the date on which the Project component to which such expenditure relates is placed in service, but in no event more than 3 years after the date of such expenditure.

2.3 Governmental Bond Status. Absent an Opinion of Bond Counsel, the Issuer will not loan more than 5% of the Proceeds to one or more Nongovernmental Persons. Absent an Opinion of Bond Counsel, the Issuer has not allowed and will not allow more than 10% of the Proceeds or the Projects to be used directly or indirectly by any Nongovernmental Person in any trade or business, other than as a member of the general public, and has not allowed and will not allow more than 5% of the Proceeds or the Projects to be so used to the extent such use is unrelated or disproportionate to the governmental uses thereof. Absent an Opinion of Bond Counsel, for purposes of this 2.3, a Nongovernmental Person will be treated as “using” Proceeds or the Projects to the extent the Nongovernmental Person:

- (i) borrows Proceeds of the Issue;
- (ii) uses any portion of the Projects as owner, lessee, service provider, operator, or manager;
- (iii) acquires the output of the Projects; or
- (iv) enters into any other arrangement that provides a special legal entitlement or special economic benefit to a Nongovernmental Person.

As of the Issue Date, the Issuer certifies that there are no contracts or other arrangements for any such use of any component of the Projects by any party other than a Governmental Unit, other than the Contract between Arlington Public Schools and A Place To Grow, entered into on August 8, 2015, pursuant to which there is private use of the Stratton School but no private payment. Absent an Opinion of Bond Counsel, the Issuer will not enter into any contract or other arrangement after the Issue Date for any such use of any component of the Projects by any party other than a Governmental Unit.

2.4 Qualified Equity. The Issuer reasonably expects that a portion of the cost of the Projects being financed and/or refinanced in part with the Sale Proceeds may be paid from Qualified Equity. In this regard, the Issuer expects to receive a grant in the maximum amount of \$84,700,343 from the Massachusetts School Building Authority (“MSBA”) for the Arlington High School reconstruction project and has received \$72,538,612 in MSBA grant payments to date for such project. The Issuer intends that the undivided portion or portions of any of the Projects paid with Qualified Equity may be used for Private Business Use without restriction, including any use pursuant to the Contracts. Qualified Equity will be allocated to any Private Business Use of the Projects before any Proceeds are allocated to any such Private Business Use. To the extent that Private Business Use of the Projects ever exceeds the applicable limitation under the “private business tests” imposed pursuant to Section 141(b), the Issuer hereby allocates Qualified Equity to the Projects. In addition, the Issuer reserves the right to allocate this Qualified Equity to the Projects if and as needed in the future.

2.5 Change in Use. The Issuer reasonably expects to use all Proceeds and all facilities that are financed and refinanced therewith as set forth in 2.3 for the entire stated term to maturity of the Issue. Absent an Opinion of Bond Counsel, the Issuer in fact will use all Proceeds and each facility financed and refinanced therewith as set forth in 2.3.

2.6 Registered Form. The bonds of the Issue are being issued in registered form.

2.7 Federal Guarantee. The Issuer will not directly or indirectly use or permit the use of any Proceeds or any other funds of the Issuer or any Related Party or take or omit to take any action that would cause the bonds of the Issue to be obligations that are “federally guaranteed.” In furtherance of this covenant, the Issuer will not allow the payment of principal or interest with respect to the Issue to be guaranteed (directly or indirectly) in whole or in part by the United States or any agency or instrumentality thereof. Except as provided in the next sentence, the Issuer will not use 5% or more of the Proceeds to make or finance loans the payment of principal or interest with respect to which is guaranteed in whole or in part by the United States or any agency or instrumentality thereof, nor will it invest 5% or more of the Proceeds in federally insured deposits or accounts. The preceding sentence shall not apply to (i) investments in the portions of the General Fund described in 3.5 during the temporary period described therein, (ii) investments in the Bona Fide Debt Service Fund, and (iii) investments in obligations issued by the United States Department of Treasury.

2.8 Information Reporting. The Issuer will cause a properly completed and executed IRS Form 8038-G to be filed with respect to the Issue no later than the 15th day of the second month of the calendar quarter immediately following the calendar quarter of the Issue Date.

2.9 No Pooling. The Issuer will not use any Proceeds directly or indirectly to make or finance loans to two or more ultimate borrowers.

2.10 No Hedge Bonds. The Issuer reasonably expects that more than 85% of Net Sale Proceeds of the Issue will be expended for the governmental purposes thereof within three years after the Issue Date. Not more than 50% of the Proceeds will be invested at a substantially guaranteed yield for four years or more.

2.11 Useful Life. The weighted average maturity of the Issue is 12.4608 years, which does not exceed 120% of the remaining average reasonably expected economic life of the assets comprising the Projects.

ARTICLE III. ARBITRAGE GENERAL

3.1 Reasonable Expectations. This Article III states the Issuer’s reasonable expectations with respect to the amounts and uses of Proceeds and certain other moneys.

3.2 Issue Price of the Issue. On the Issue Date, the Issuer is delivering the bonds of the Issue to the Successful Bidder in exchange for an aggregate payment of \$12,080,034.30 (which represents the total amount of Sale Proceeds, \$12,107,127.00, less an underwriter’s discount of \$27,092.70). As reflected in Exhibit B, the Municipal Advisor has certified that the competitive sale requirements (as defined in the Notice of Sale) were met with respect to the bonds of the Issue. Accordingly, based on the advice of the Successful Bidder as set forth in Exhibit A, the Issue Price of the Issue is \$12,107,127.00, which is the reasonably expected initial offering prices to the Public for the bonds of the Issue.

3.3 Funds and Accounts. The Issuer will use certain portions of its General Fund (or accounts or subaccounts within the General Fund) to hold certain of the Proceeds, as more particularly described in this Article III. The Issuer does not expect that either it or any other Person benefiting from the issuance of the Issue will use any moneys in any fund or account other than the Bona Fide Debt Service Fund to pay debt service on the Issue; nor is any other fund or account so pledged as security for the Issue that there is a reasonable assurance that amounts held in such other fund or account will be available if needed to pay debt service on the Issue.

3.4 Bona Fide Debt Service Fund.

3.4.1 Payment of the Issue. The bonds of the Issue are general obligations of the Issuer payable from revenues available therefor pursuant to the Massachusetts General Laws and, when and as applicable, Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations.

3.4.2 Revenues. Except for the debt service to be paid from a portion of the Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations, each when and as applicable, payments of debt service on the Issue are expected to be derived from current revenues of the Issuer and current revenues are expected to equal or exceed such amount of debt service on the Issue during the payment period.

3.4.3 Match Between Revenues and Debt Service. The portions of the Issuer's General Fund that are reasonably expected to be used to pay debt service on the Issue (such portions of the Issuer's General Fund being referred to herein as the "Debt Service Fund") will be allocated to the payment of debt service on the Issue on a "first in, first out" (FiFo) basis. Accordingly, the Debt Service Fund will be used primarily to achieve a proper matching of revenues and debt service within the Bond Year. Amounts in the Debt Service Fund will be invested without regard to yield.

3.5 Three-Year Temporary Period. A portion of the Sale Proceeds in the amount of \$11,978,000.00, will be deposited in the General Fund for the purpose of paying costs of the Projects. The Issuer's expenditure expectations with respect to the Proceeds allocable to the Projects are reflected in Exhibit C. The Issuer reasonably expects that at least 85% of the Net Sale Proceeds will be spent to pay costs of the Projects within three years from the Issue Date. The Issuer heretofore has incurred or within six months hereafter will incur a binding obligation to one or more unrelated parties involving an expenditure of not less than 5% of Net Sale Proceeds. Completion of the Projects and allocations of Net Sale Proceeds and Investment Proceeds to costs of the Projects will proceed with due diligence. Net Sale Proceeds allocable to paying costs of the Projects held in the General Fund, and Investment Proceeds earned thereon, will be invested without regard to yield during the period ending on the third anniversary of the Issue Date.

3.6 No Overissuance. Taking into account anticipated Investment Proceeds, the Sale Proceeds do not exceed the amount necessary to pay (i) costs of the Projects, (ii) Funded Interest, if applicable, and (iii) Issuance Costs and other common costs of the Issue.

3.7 No Other Replacement Proceeds. Neither the Issuer nor any Related Party will use any Gross Proceeds directly or indirectly to replace funds of the Issuer or any Related Party, which funds are or will be used directly or indirectly to acquire Investment Property reasonably expected to produce a yield that is materially higher than the Yield on the Issue.

3.8 No Expected Sale. It is not expected that the Projects or any part thereof financed and/or refinanced in whole or in part by the Issue will be sold or otherwise disposed of before February 1, 2055, the scheduled final maturity date of the Issue, except for minor portions due to normal wear or obsolescence.

ARTICLE IV. ARBITRAGE - YIELD AND YIELD RESTRICTION

4.1 Yield. The Yield on the Issue, adjusted as may be required for substantial original issue premium or discount, has been calculated by the Municipal Advisor to be 3.4808293493%, as reflected in Exhibit B.

4.2 No Qualified Hedges. No Qualified Hedge has been, and (absent an Opinion of Bond Counsel) no Qualified Hedge will be, entered into such that failure to take the Qualified Hedge into account would distort the Yield on the Issue or otherwise would fail clearly to reflect the economic substance of the transaction.

4.3 Yield Restriction. Absent an Opinion of Bond Counsel, if the sum of (A) any Proceeds allocable to the payment of the Projects held in the General Fund after the third anniversary of the Issue Date, or, if applicable, the Issue Date of any Original Issue, plus (B) any amounts held in the Bona Fide Debt Service Fund and remaining unexpended after 13 months from the date of accumulation in such fund (excluding any amounts held for Capitalized Interest and Funded Interest), plus, if applicable, (C) any Proceeds allocable to the retirement of any Refunded Bonds and Refunded Notes held in the General Fund after 90 days from the Issue Date, plus, if applicable, (D) any Transferred Proceeds held in the General Fund after the third anniversary of any Original Issue, plus (E) any Proceeds held in the Issuer's General Fund to pay Issuance Costs after 90 days from the Issue Date, at any time in the aggregate exceeds \$100,000, the excess will be invested as follows: (i) in Investment Property with a yield not exceeding the Yield on the Issue, or such other issue of Tax-Exempt Bonds to which such amounts are then allocated as proceeds, (ii) in assets that are not treated as Investment Property (e.g., Tax-Exempt Bonds), or (iii) in assets that satisfy the requirements for Yield Reduction Payments.

ARTICLE V. REBATE

5.1 Undertakings. The Issuer hereby covenants to comply with requirements of the Code pertaining to the Rebate Requirement. The Issuer acknowledges that the United States Department of the Treasury has issued Regulations with respect to certain of these undertakings, including the proper method for computing whether any rebate amount is due the federal government under Section 148(f). (Reg §§ 1.148-1 through 1.148-11A, 1.150-1, and 1.150-2.) The Issuer further acknowledges that the United States Department of the Treasury may yet issue additional Regulations with respect to certain of these undertakings. The Issuer covenants that it will undertake to determine what is required with respect to the rebate provisions contained in

Section 148(f) and said Regulations from time to time and will comply with any requirements that may apply to the Issue.

5.2 Recordkeeping. The Issuer shall maintain or cause to be maintained detailed records with respect to each Nonpurpose Investment allocable to Gross Proceeds, including: (a) purchase date; (b) purchase price; (c) information establishing fair market value on the date such investment became a Nonpurpose Investment; (d) any accrued interest paid; (e) face amount; (f) coupon rate; (g) periodicity of interest payments; (h) disposition price; (i) any accrued interest received; and (j) disposition date. Such detailed recordkeeping is required to facilitate the calculation of the Rebate Requirement.

5.3 Exceptions to the Rebate Requirement.

5.3.1 Bona Fide Debt Service Fund Exception. Based on the representations set forth in 3.4.3 and this 5.3.1, no rebate calculations need be made in respect of amounts in the Bona Fide Debt Service Fund (i) if (a) the weighted average maturity of the Issue is longer than 5 years and (b) the Issue is a Fixed Yield Issue or (ii) if clause (i) does not apply, to the extent the earnings thereon in the Bond Year are less than \$100,000.

5.3.2 Six-Month Expenditure Exception. If applicable, no rebate calculations will be required to be made with respect to the Adjusted Gross Proceeds allocable to the Refunding Portion if all such Adjusted Gross Proceeds are expended within six months of the Issue Date.

5.3.3 Eighteen Month Spending Exception. In general, when applicable, no rebate calculations will be required with respect to Adjusted Gross Proceeds if the Eighteen Month Spending Exception is met. The Issuer's spending expectations with respect to the Adjusted Gross Proceeds are included in Exhibit C.

5.3.4 Two Year Spending Exception. The Issuer reasonably expects that at least 75% of Available Construction Proceeds will be expended for Construction Expenditures with respect to the Projects. The Issuer's spending expectations with respect to the Proceeds allocable to the New Money Projects or the Projects, as applicable, are reflected in Exhibit C. In general, when applicable, no rebate calculations will be required with respect to Available Construction Proceeds if Available Construction Proceeds are spent in accordance with the Two Year Spending Exception. Additionally, Proceeds of the Issue that are used to pay Issuance Costs will be treated, together with all Investment Proceeds thereon, as satisfying the Rebate Requirement if the Two Year Spending Exception is satisfied and all such Issuance Costs are paid within twenty-four months after the Issue Date.

5.4 Rebate Requirement or Yield Reduction Payments with Respect to the Issue. The Issuer covenants to, and will, pay any Rebate Requirement or Yield Reduction Payments due with respect to the Issue within 60 days from the Computation Date for the Issue or, if later, within 60 days of missing one of the spending milestones, as required by Section 148(f)(3).

ARTICLE VI. OTHER MATTERS

6.1 Expectations. The undersigned are authorized representatives of the Issuer acting for and on behalf of the Issuer in executing this Tax Certificate. To the best of the knowledge and belief of the undersigned, there are no other facts, estimates or circumstances that would materially change the expectations as set forth herein, and said expectations are reasonable.

6.2 Covenant to Comply. The Issuer hereby covenants that it will not take or permit to be taken on its behalf any action or actions that would adversely affect the exclusion from federal income taxation of interest on the Issue and will take or require to be taken such acts as may reasonably be within its ability and as may from time to time be required under applicable law to maintain the exclusion from federal income taxation of interest on the Issue.

6.3 Post Issuance Compliance Procedures. The Issuer has written procedures to monitor compliance with the arbitrage Yield restriction and rebate requirements of Section 148 after the Issue Date. The Issuer also has written procedures to ensure that all Nonqualified Bonds are remediated in accordance with Reg § 1.141-12. Such procedures are substantially in the form attached hereto as Appendix C. The Issuer will monitor the expenditure of Gross Proceeds and the use of facilities financed and/or refinanced by the Issue, and will undertake, if necessary, any available measures under Reg § 1.141-12 to ensure compliance after the Issue Date with the applicable covenants contained herein.

6.4 Record Retention. In order to ensure that interest on the Issue continues to be excluded from gross income for federal tax law purposes, the Issuer acknowledges that records should be maintained to support the representations, certifications, and expectations set forth in this Tax Certificate (including the exhibits hereto) at least until the date three (3) years after the later of (a) the date on which the Issue is retired, or (b) the date on which the last of the Refunding Obligations is retired. In addition to the items described in 5.2, records to be retained include, but are not limited to:

- (i) basic records and documents relating to the Issue, and, when applicable, the Prior Issues and any Qualified Equity relating to the Projects;
- (ii) documentation evidencing the expenditure of the Proceeds and, when applicable, Proceeds of the Prior Issues;
- (iii) documentation evidencing the use of the Projects or any component thereof by public and private sources (i.e., copies of management contracts, research agreements, leases, etc.);
- (iv) documentation evidencing all sources of payment or security for the Issue and, when applicable, the Prior Issues;

(v) documentation evidencing compliance with the timing and allocation of expenditures of the Proceeds, and, when applicable, Proceeds of the Prior Issues and any Qualified Equity relating to the Projects; and

(vi) records of all amounts paid to the United States in satisfaction of the Rebate Requirement for the Issue and IRS Forms 8038-T (or successor forms thereto) related to such payments or to Yield Reduction Payments.

6.5 Amendments. Notwithstanding any other provision of this Tax Certificate, the Issuer may amend this Tax Certificate and thereby alter any actions allowed or required by this Tax Certificate if such amendment is signed by an authorized officer and is supported by an Opinion of Bond Counsel.

[Remainder of page intentionally left blank; signature page follows.]

6.6 Survival of Payment or Defeasance. Notwithstanding any provision in this Tax Certificate or in any other agreement or instrument relating to the Issue to the contrary, the obligation to remit the Rebate Requirement, if any, to the United States Department of the Treasury and to comply with all other requirements contained in this Tax Certificate shall survive payment or defeasance of the Issue.

6.7 Execution of Counterparts and Delivery by Electronic Means. This Certificate, as well as any other certificates or documents relating to the Issue (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Dated: February 27, 2025

TOWN OF ARLINGTON, MASSACHUSETTS

By: _____
Treasurer

By: _____

Select Board

APPENDIX A GENERAL DEFINITIONS

For purposes of the Tax Certificate to which this Appendix A is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

501(c)(3) Organization means any entity described in Section 501(c)(3).

Adjusted Gross Proceeds generally means Gross Proceeds, less amounts held in the Bona Fide Debt Service Fund.

Available Construction Proceeds has the meaning set forth in Reg § 1.148-7(i) and generally means all Sale Proceeds reduced by Issuance Costs or, if applicable, all Sale Proceeds allocable to the Nonrefunding Portion, reduced by Issuance Costs allocable to the Nonrefunding Portion financed with Sale Proceeds, plus all Investment Proceeds earned thereon before the earlier of two years after the Issue Date or substantial completion of the New Money Projects or Projects, as applicable. In determining the amount of Available Construction Proceeds as of any date, there shall be included the amount of investment earnings reasonably expected after such date, together with investment earnings actually received or accrued as of such date.

Bona Fide Debt Service Fund has the meaning set forth in Reg § 1.148-1(b) and generally means the Debt Service Fund identified in 3.4.3.

Bond Counsel means Troutman Pepper Locke LLP or, if applicable, another law firm with a nationally recognized public finance practice.

Bond Notice of Sale means, when applicable, the separate Notice of Sale for the bonds of the Issue.

Bond Purchaser means, when applicable, an entity that purchases the bonds of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Capitalized Interest means interest on the Issue, or, when applicable, a Prior Issue, from the Issue Date to the placed in service date of the Projects, that is properly capitalized in the cost of the Projects under general federal income tax principles.

Code means the Internal Revenue Code of 1986, as amended.

Computation Date has the meaning set forth in Reg § 1.148-3(e) and generally means the date not later than the fifth Bond Year and each five years thereafter and the final maturity date of the Issue, each as applicable.

Construction Expenditures has the meaning set forth in Reg § 1.148-7(g)(1) and generally means capital expenditures that are allocable to the cost of real property or constructed personal property and includes costs of reconstruction and rehabilitation, but does not include costs of acquiring any interest in land or other existing real or personal property.

Controlled Group has the meaning set forth in Reg § 1.150-1(c) and generally means a group of entities controlled directly or indirectly by the same entity or group of entities.

Debt Service Fund means the Debt Service Fund described in Article III.

Deliberate Action has the meaning set forth in Reg § 1.141-2(d)(3) and generally means any action taken by the Issuer that is within its control, but excludes (i) an involuntary or compulsory conversion under Section 1033 or (ii) an action taken in response to a regulatory directive made by the federal government.

Eighteen Month Spending Exception has the meaning set forth in Reg § 1.148-7(d) and generally means Adjusted Gross Proceeds are spent at least as quickly as follows:

15% within six months after the Issue Date

60% within twelve months after the Issue Date

100% within eighteen months after the Issue Date

The requirement that 100% of Adjusted Gross Proceeds be spent within eighteen months after the Issue Date will be met if at least 95% of Adjusted Gross Proceeds is spent within eighteen months and the remainder is held as a Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty months after the Issue Date.

Fixed Yield Bond has the meaning set forth in Reg § 1.148-1(b) and generally means any bond whose yield is fixed and determinable on its Issue Date.

Fixed Yield Issue has the meaning set forth in Reg § 1.148-1(b) and generally means any issue of which each bond of the issue is a Fixed Yield Bond.

Funded Interest means interest on the Issue, or, when applicable, a Prior Issue, other than Capitalized Interest, through the later of three years after the Issue Date, or, if applicable, the Issue Date of a Prior Issue, or one year after the first component of the Projects is placed in service as set forth in Reg § 1.148-6(d)(3)(ii)(A)(3).

General Rule Maturities means, when applicable, those Maturities listed as the general rule maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Governmental Person has the meaning set forth in Reg § 1.141-1(b) and generally means a Governmental Unit.

Governmental Unit means a State or Local Governmental Unit.

Gross Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means all proceeds derived from or relating to the Issue, or, when applicable, a Prior Issue, including Proceeds and Replacement Proceeds.

Guidelines means Reg §1.141-3(b)(4) and Revenue Procedure 2017-13 or any applicable predecessor or successor thereto.

Hold-the-Offering-Price Maturities means, when applicable, those Maturities listed as the hold-the-offering-price maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Holding Period means, with respect to a Hold-the-Offering-Price Maturity, the period starting on the Sale Date and ending on the earlier of (i) the close of the fifth business day after the Sale Date, or (ii) the date on which the Successful Bidder/Successful Bond Bidder/Successful Note Bidder sold at least 10% of such Hold-the-Offering-Price Maturity to the Public at prices that are no higher than the initial offering price for such Hold-the-Offering-Price Maturity.

Investment Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means earnings received from investing and reinvesting Proceeds and from investing and reinvesting such earnings.

Investment Property has the meaning set forth in Section 148(b)(2) and generally means any security or obligation, any annuity contract, or any other investment-type property, but does not include any Tax-Exempt Bond.

Issuance Costs has the meaning set forth in Reg § 1.150-1(b) and generally means costs, to the extent incurred in connection with, and allocable to, the issuance of the Issue within the meaning of Section 147(g), and includes: underwriters' spread; counsel fees; financial advisory fees; credit rating fees; trustee fees; paying agent fees; bond registrar, certification, and authentication fees; accounting fees; printing costs; public approval process costs; engineering and feasibility study costs; and similar costs.

Issue Date has the meaning set forth in Reg § 1.150-1(b) and generally means the date the Issue, or, when applicable, a Prior Issue, was delivered to the Underwriter or Purchaser thereof and payment was received therefor.

Issue Price has the meaning set forth in Reg § 1.148-1(f) and generally means (i) the Expected Offering Price of a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, (ii) the amount paid by the Purchaser for the Issue, the notes of the Issue, and/or the bonds of the Issue, and/or (iii) the price at which at least 10% of each maturity of the General Rule Maturities were sold by the Successful Bidder/Successful Bond Bidder/Successful Note Bidder, all as set forth in Exhibit A, or, when applicable, the sum of the applicable clauses above.

Maturity means bonds and/or notes of the Issue with the same credit and payment terms. Bonds and/or notes of the Issue with different maturity dates, or with the same maturity date but different stated interest rates, are treated as separate maturities.

Minor Portion has the meaning set forth in Section 148(e) and generally means any amount of Gross Proceeds that does not exceed the lesser of (i) 5% of the Proceeds or (ii) \$100,000.

Net Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means the Sale Proceeds allocable to the Nonrefunding Portion, less the portion of those Sale Proceeds invested in a reasonably required reserve or replacement fund pursuant to Section 148(d) or as part of the Minor Portion.

Nongovernmental Person means any Person other than a Governmental Person. Nongovernmental Person includes the United States and any agency or instrumentality of the United States.

Nonpurpose Investment means any Investment Property in which Gross Proceeds are invested that is not a Purpose Investment.

Nonqualified Bonds has the meaning set forth in Reg § 1.141-12(j) and generally means the portion of outstanding bonds of an Issue that, as of the date of a Deliberate Action, would not meet the private business use test in Section 141(b) or the private loan financing test in Section 141(c).

Nonrefunding Portion means, when applicable, the portion of the Issue or the Prior Issue, as applicable, that is not allocable to the Refunding Portion.

Note Notice of Sale means, when applicable, the separate Notice of Sale for the notes of the Issue.

Note Purchaser means, when applicable, an entity that purchases the notes of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Notice of Sale means the Notice of Sale, or, when applicable, collectively the Bond Notice of Sale and Note Notice of Sale, attached as Attachment 1 to Exhibit B.

Opinion of Bond Counsel means a written opinion of nationally recognized bond counsel, delivered to the Issuer, to the effect that the exclusion from gross income for federal income tax purposes of interest on the Issue will not be adversely affected.

Original Issues means, when applicable, collectively, the portions of the Refunded Bonds and/or Refunded Notes and the issues that were issued to finance the Projects on a “new money” basis and any other obligations all or a portion of which were issued to finance the Projects on a new money basis which have been ultimately refinanced by this Issue.

Person has the meaning set forth in Section 7701(a)(1) and generally includes an individual, trust, estate, partnership, association, company or corporation.

Preliminary Expenditures has the meaning set forth in Reg § 1.150-2(f)(2) and generally means architectural, engineering, surveying, soil testing, Issuance Costs, including, when applicable, Issuance Costs allocable to the Nonrefunding Portion, and similar costs paid with respect to the Projects in an aggregate amount not exceeding 20% of the Issue Price of the Issue, or, when applicable, the Issue Price of the Issue allocable to the Nonrefunding Portion. However, Preliminary Expenditures do not include land acquisition, site preparation or similar costs incident to the commencement of construction.

Prior Issue(s) means, when applicable, individually or collectively, the Original Issues and each series of exclusively current refunding obligations all or a portion of which were thereafter issued to refinance the Original Issues.

Private Business Use has the meaning set forth in Reg § 1.141-3(a) and generally means use (directly or indirectly) in a trade or business carried on by any Nongovernmental Person other than use (i) as a member of, and on the same basis as, the general public or (ii) pursuant to the Guidelines or the Research Guidelines. Any activity carried on by a Nongovernmental Person (other than a natural Person) shall be treated as a trade or business.

Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means Sale Proceeds, Investment Proceeds and Transferred Proceeds of the Issue or, when applicable, a Prior Issue.

Public has the meaning set forth in Reg § 1.148-1(f)(3)(ii) and generally means any Person other than an Underwriter or a Related Party to an Underwriter.

Purchaser means, when applicable, an entity, including a Successful Bidder, that purchases the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Purpose Investment has the meaning set forth in Reg § 1.148-1(b) and generally means an investment that is acquired by the Issuer to carry out the governmental purpose of the Issue.

Qualified Equity has the meaning set forth in Reg § 1.141-6(b)(3) and generally means funds that are not derived from proceeds of a Tax-Advantaged Bond.

Qualified Guarantee has the meaning set forth in Reg § 1.148-4(f) and generally means an arrangement that imposes a secondary liability that unconditionally shifts substantially all of the credit risk for all or part of the payments on the Issue to the guarantor under that arrangement.

Qualified Hedge has the meaning set forth in Reg § 1.148-4(h) and generally means a contract entered into by the Issuer with a hedge provider primarily to modify the Issuer's risk of interest rate changes with respect to all or a part of the Issue.

Reasonable Retainage has the meaning set forth in Reg § 1.148-7(h) and generally means an amount, not to exceed 5% of Available Construction Proceeds or Adjusted Gross Proceeds, as applicable, on the date 24 months, or 18 months, as applicable, after the Issue Date, that is retained for reasonable business purposes relating to the Projects, including to ensure or promote compliance with a construction contract.

Rebate Requirement means the amount of rebatable arbitrage with respect to the Issue, computed as of the last day of any Bond Year pursuant to Reg § 1.148-3.

Refunded Bonds means, when applicable, all or the portion of each of the series of bonds being refunded by the Issue, as identified in Appendix B.

Refunded Notes means, when applicable, all or the portion of each of the series of notes being refunded by the Issue, as identified in Appendix B.

Refunding Obligations means a Tax-Advantaged Bond issued to refund any portion of the Issue, including any subsequent Tax-Advantaged Bond in a series of refundings thereof.

Refunding Portion means, when applicable, the portion of the Issue allocable to the refunding of the Refunded Bonds and/or Refunded Notes, together with the portion of the Issue allocable to the financing of a ratable share of Issuance Costs and other common costs of the Issue.

Regulations or Reg means the applicable Treasury Regulations promulgated by the Secretary of the Treasury of the United States under the Code.

Related Party has the meaning set forth in Reg §1.150-1(b) and generally means, in reference to a Governmental Unit or a 501(c)(3) Organization, any member of the same Controlled Group, and in any reference to any other Person, any two or more Persons who have more than fifty percent (50%) common ownership, directly or indirectly.

Replacement Proceeds has the meaning set forth in Reg §1.148-1(c) and generally means amounts that have a sufficiently direct nexus to the Issue or to the governmental purpose of the Issue to conclude that the amounts would have been used for that governmental purpose if the Proceeds of the Issue were not used, and includes a sinking fund, a pledged fund, and other replacement proceeds, each as defined in Reg § 1.148-1(c).

Research Guidelines means Reg §1.141-3(b)(6) and Revenue Procedure 2007-47 or any applicable successor thereto.

Sale Date has the meaning set forth in Reg § 1.150-1(c)(6) and generally means the first day on which there is a binding contract in writing for the sale of a Maturity.

Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means amounts actually or constructively received from the sale of the Issue, or, when applicable, a Prior Issue.

Signature Certificate means the Signature, No Litigation and Official Statement Certificate or similar certificate prepared by Bond Counsel relating to the Issue or, when applicable, a Prior Issue.

Small Issuer Exception has the meaning set forth in Section 148(f)(4)(D) and Reg § 1.148-8(a) and generally means that, as of the Issue Date, either (i) the Issue meets the exception for a current refunding under Section 148(f)(4)(D)(v) or (ii) the Issuer reasonably expects that the aggregate Issue Price of Tax-Exempt Bonds (other than (a) current refunding bonds to the extent the amount thereof does not exceed the outstanding amount of the obligations to be refunded thereby and (b) qualified private activity bonds) issued and to be issued by or on behalf of the Issuer during the current calendar year will not exceed \$5,000,000 except by the lesser of (1) \$10,000,000 or (2) the aggregate face amount of bonds, in either case attributable to financing the construction of public school facilities, as provided in Section 148(f)(4)(D)(vii). In

addition, the Issuer must have the power to impose or to cause the imposition of taxes of general applicability which, when collected, may be used for the general purposes of the Issuer. The Issuer's power to impose or cause the imposition of such taxes cannot be contingent on approval by any other Governmental Unit. The Issuer cannot form or avail itself of an entity for the purpose of avoiding the volume limitation described above.

State or Local Governmental Unit has the meaning set forth in Reg § 1.103-1(a) and is generally a state or any political subdivision of a state, but excludes the United States and its agencies or instrumentalities.

Successful Bidder(s) means, when applicable, the Successful Bidder(s) set forth in Appendix B.

Successful Bond Bidder means, when applicable, the Successful Bond Bidder set forth in Appendix B.

Successful Note Bidder means, when applicable, the Successful Note Bidder set forth in Appendix B.

Tax-Advantaged Bond has the meaning set forth in Reg § 1.150-1(b) and generally means a tax-exempt bond or a taxable bond that provides a federal tax benefit that reduces the Issuer's borrowing costs.

Tax Certificate means the Tax Certificate to which this Appendix A is attached.

Tax-Exempt Bond means any obligation the interest on which is excluded from gross income for federal income tax purposes pursuant to Section 103, other than a "specified private activity bond" within the meaning of Section 57(a)(5)(C), as well as (i) stock in a "regulated investment company" (within the meaning of Section 852) to the extent at least 95 percent of income to the stockholder is treated as interest on Tax-Exempt Bonds and (ii) any demand deposit obligation issued by the United States Department of the Treasury pursuant to Subpart C of 31 CFR Part 344.

Transferred Proceeds has the meaning set forth in Reg § 1.148-9(b) and generally means Proceeds of a Prior Issue that become Proceeds of the Issue under the transferred proceeds allocation rule in Reg § 1.148-9(b).

Two Year Spending Exception has the meaning set forth in Reg § 1.148-7(e) and generally means Available Construction Proceeds are expended at least as quickly as follows:

- 10% within six months after the Issue Date
- 45% within twelve months after the Issue Date
- 75% within eighteen months after the Issue Date
- 100% within twenty-four months after the Issue Date

The requirement that 100% of Available Construction Proceeds be spent within twenty-four months after the Issue Date will be met if at least 95% of Available Construction Proceeds is spent within twenty-four months and the remainder is held as Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty-six months after the Issue Date.

Underwriter means (i) any Person, including, when applicable, a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, that agrees pursuant to a written contract with the Issuer (or with the lead underwriter to form an underwriting syndicate) to participate in the initial sale of the bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public, and (ii) any Person that agrees pursuant to a written contract directly or indirectly with a Person described in clause (i) of this paragraph to participate in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public (including a member of a selling group or a party to a third-party distribution agreement participating in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public).

Votes means the authorizations for the Issue specified in the Signature Certificate.

Yield has the meaning set forth in Reg § 1.148-4 for an issue and Reg § 1.148-5 for investments, and generally means, as to the Issue, or, when applicable, a Prior Issue, or Investment Property, as applicable, that discount rate which, when used in computing the present value of all unconditionally payable payments representing (i) principal, adjusted, as required, for any substantial discounts or premiums, (ii) interest, including costs of Qualified Guarantees, and (iii) payments or receipts on Qualified Hedges, produces an amount equal to the Issue Price of the Issue, or, when applicable, a Prior Issue, or the purchase price of Investment Property, as appropriate.

Yield Reduction Payment means a “qualified yield reduction payment” to the United States Department of the Treasury that reduces the yield on Investment Property, as set forth in Reg § 1.148-5(c).

APPENDIX B

ISSUE SPECIFIC DEFINITIONS

For purposes of the Tax Certificate to which this Appendix B is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

Bond Year means the period beginning on the Issue Date and ending on February 27, 2026 (or on an earlier date selected by the Issuer in accordance with Reg § 1.148-1(b)), and each successive one-year period thereafter. The last Bond Year will end on the last day on which any bonds of the Issue will remain outstanding for federal tax purposes.

Issue Date means, as to the Issue, the date of this Tax Certificate, February 27, 2025.

Municipal Advisor means Hilltop Securities Inc., as municipal advisor to the Issuer in connection with the Issue.

Sale Date of the Issue is February 5, 2025.

Sale Proceeds means as to the Issue, the amount of \$12,107,127.00, comprising the stated principal amount of the Issue (\$11,355,000), plus original issue premium thereon in the amount of \$752,127.00.

Successful Bidder means Fidelity Capital Markets, a Division of National Financial Services LLC.

APPENDIX C
POST-ISSUANCE TAX COMPLIANCE PROCEDURES
TAX-EXEMPT OBLIGATIONS AND OTHER TAX-BENEFITED OBLIGATIONS

I. Introduction

These post-issuance compliance procedures of the Issuer are designed to provide for the effective management of the Issuer's post issuance compliance program for tax-exempt and other tax-benefited obligations in a manner consistent with state and federal laws applicable to such obligations.

II. Post-Issuance Tax Compliance

The Treasurer of the Issuer, or such other designated officer (the "Compliance Officer") shall be the primary bond compliance officer responsible for each issuance by the Issuer of tax-exempt (or otherwise tax-benefited) bonds, notes, financing leases, or other obligations (herein, collectively referred to as "bonds"). All information related to each bond issue and the facilities, equipment and other assets financed by such issue shall be maintained by or on behalf of the Compliance Officer and the actions taken under subsections A through C of this Section II shall be taken by the Compliance Officer or on behalf of the Compliance Officer by such other officers or employees of the Issuer as appropriate.

A. Tax Certificate and Continuing Education

- 1. Tax Certificate** – A Tax Certificate is prepared for each issuance of bonds. Immediately upon issuing any bonds, the Compliance Officer, in conjunction with the Issuer's bond counsel and financial advisor, shall review the Tax Certificate and make notes regarding specific compliance issues for such bond issue on the Post-Issuance Compliance Notes form at Exhibit A. The Tax Certificate and Notes shall clearly define the roles and responsibilities relating to the ongoing compliance activities for each bond issue and will identify specific compliance requirements.
- 2. Continuing Education** – The Compliance Officer will actively seek out advice of bond counsel on any matters that appear to raise ongoing compliance concerns and may attend or participate in seminars, teleconferences, etc. sponsored by organizations such as the Massachusetts Collector-Treasurer Association and the Massachusetts Government Finance Officers Association that address compliance issues and developments in the public finance bond arena. In addition, national organizations such as the Securities Industry and Financial Markets Association (SIFMA) and the National Association of Bond Lawyers (NABL) offer numerous training opportunities and materials which may be useful to the Compliance Officer.

B. Tax-Exempt Bonds Compliance Monitoring

- 1. Restrictions against Private Use** – The Compliance Officer will continuously monitor the expenditure of bond proceeds and the use of facilities or equipment financed or refinanced with bonds to ensure compliance with Section 141 of the Internal Revenue

Code (the “Code”) which generally establishes limitations on the use of bond-financed facilities by non-state or local governmental entities, such as individuals using bond-financed assets on a basis other than as a member of the general public, corporations and the federal government and its agencies and instrumentalities.

a. Use of Bond Proceeds – The Compliance Officer will monitor and maintain records with respect to expenditures to ensure that bond proceeds are being used on capital expenditures for governmental purposes in accordance with the bond documents and document the allocation of all bond proceeds. Such monitoring is required not only for tax-exempt bonds, but also for tax credit bonds.

b. Use of the Bond-Financed Facility or Equipment

i. Equipment assets financed with bonds will be listed in a schedule for each bond issue, which schedule may be included in the Tax Certificate. Equipment assets generally are not to be disposed of prior to the earlier of (a) the date the bonds and all subsequent refundings of such bonds are fully paid, or (b) the end of the useful life of such equipment. The Compliance Officer will maintain the list of all bond-financed equipment for each bond issue, together with the equipment’s expected useful life.

ii. Constructed or acquired assets financed with bonds – In order to ensure that assets constructed or acquired using bond proceeds, such as infrastructure assets, are not leased, sold or disposed of prior to the end of the term of the bonds and of all subsequent refundings of such bonds:

- Any asset constructed or acquired with bond proceeds shall be flagged in the Issuer’s records, and
- These projects will be monitored by the Compliance Officer.

iii. If there is any proposal to change the use of a bond-financed facility from a governmental purpose to a use in which a private entity may have the use or benefit of such a facility on a basis that is different from the rest of the general public, the Compliance Officer will consult with bond counsel prior to the occurrence of the proposed change in use.

2. Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bonds

a. Expectations as to Expenditure of “New Money” Bond Proceeds

i. In order to qualify under the arbitrage rules for an initial temporary period of 3 years for “new money” issues during which bond proceeds can be invested without regard to yield (but potentially subject to rebate), the Issuer must reasonably expect to spend at least 85% of “spendable proceeds” by the end of the temporary period. In general under Code Section 149, in order to avoid classification of an issue of bonds as “hedge bonds,” the Issuer must both (x) reasonably expect to spend 85% of the “spendable proceeds” of the bond issue within the 3 year period beginning on the date the bonds are issued and (y)

invest not more than 50% of the proceeds of the issue in investments having a substantially guaranteed yield for 4 years or more. These expectations have been documented for the Issuer's outstanding bond issues in the tax certificates executed in connection with each bond issue.

- ii. If, for any reason, the Issuer's expectations concerning the period over which the bond proceeds are to be expended change from what was documented in the applicable tax certificate, the Compliance Officer will consult with bond counsel.

b. Project Draw Schedule Compliance Monitoring – While there are unspent proceeds of a bond issue, the Compliance Officer will compare and analyze the original anticipated project draw schedule and the actual expenditure payouts and reimbursements on each bond-financed project on an annual or more frequent basis. The purpose of this analysis is to determine the variances from the original expected draw schedule for each project and to document the reasons for these variances to provide a continual record on the spending progress of each bond-financed project. Factors relevant to the analysis include unexpected delays in the project timelines, extreme weather, contract time extensions due to unexpected events, supplemental agreements and any other factor with a potential to impact the progress or completion of the projects. Generally, there should be no effect on the tax-exempt status of the bonds under either the temporary period rules or the hedge bond rules if the actual disbursements do not meet the original project draw schedule, unless circumstances surrounding the actual events cast doubt on the reasonableness of the stated expectations on the issuance date. Therefore, it is important for the Compliance Officer to update the progress of each project at least annually, and consult with bond counsel as to any variance from the original schedule.

c. Bond Proceeds Expenditure Schedule Compliance Monitoring – While there are unspent proceeds of bonds, the Compliance Officer will compare and analyze the bond proceeds expenditure schedule and the actual investment earnings on each project on an annual or more frequent basis. The purpose of this analysis is to determine any variances from the expected expenditure schedule and to document the reasons for these variances.

3. Arbitrage Rebate Compliance

- a. Bonds may lose their tax-favored status, retroactive to the date of issuance, if they do not comply with the arbitrage restrictions of section 148 of the Code. Two general sets of requirements under the Code must be applied in order to determine whether governmental bonds are arbitrage bonds: the yield restriction requirements of section 148(a) and the rebate requirements of section 148(f).
- b. **Yield Restriction Requirements** – The yield restriction requirements provide, in general terms, that gross proceeds of a bond issue may not be invested in investments earning a yield higher than the yield of the bond issue, except for investments (i) during one of the temporary periods permitted under the regulations (including the

initial three year temporary period described above), (ii) in a reasonably required reserve or replacement fund or (iii) in an amount not in excess of the lesser of 5% of the sale proceeds of the issue or \$100,000 (the “minor portion”). Under limited circumstances, the yield on investments subject to yield restriction can be reduced through payments to the IRS known as “yield reduction payments.” The Tax Certificate will identify those funds and accounts associated with a particular issue of bonds known, as of the date of issuance, to be subject to yield restriction.

c. Rebate Requirements

- i. If, consistent with the yield restriction requirements, amounts treated as bond proceeds are permitted to be invested at a yield in excess of the yield on the bonds (pursuant to one of the exceptions to yield restriction referred to above), rebate payments may be required to be made to the U.S. Treasury. Under the applicable regulations, the aggregate rebate amount is the excess of the future value of all the receipts from bond funded investments over the future value of all the payments to acquire such investments. The future value is computed as of the computation date using the bond yield as the interest factor. At least 90% of the rebate amount calculated for the first computation period must be paid no later than 60 days after the end of the first computation period. The amount of rebate payments required for subsequent computation periods (other than the final period) is that amount which, when added to the future value of prior rebate payments, equals at least 90% of the rebate amount. For the final computation period, 100% of the calculated amount must be paid. Rebate exceptions and expectations are documented for each bond issue in the tax certificate executed at the time of such bond issue.
- ii. **While there are unspent proceeds of bonds, the Issuer will engage an experienced independent rebate analyst to annually calculate any rebate that may result for that year and annually provide a rebate report to the Compliance Officer. Bond counsel can assist with referrals to qualified rebate analysts.**

d. Timing of Rebate Payments

The Compliance Officer will work with the rebate analyst to ensure the proper calculation and payment of any rebate payment and/or yield-reduction payment at the required time:

- i. First installment due no later than 60 days after the end of the fifth anniversary of each bond issuance;
- ii. Succeeding installments at least every five years;

- iii. Final installment no later than 60 days after retirement of last bond in the issue.¹

4. Refunding Requirements

- a. **Refunded Projects** – The Compliance Officer will maintain records of all bond financed assets for each bond issue, including assets originally financed with a refunded bond issue.
- b. **Yield Restriction** – The Compliance Officer will work with its financial advisor and bond counsel to maintain records of allocation of bond proceeds for current and advance refundings of prior bond issues to ensure that such bond proceeds are expended as set forth in the applicable tax certificate executed at the time the refunding bonds are issued. Any yield restricted escrows will be monitored for ongoing compliance.

C. Record Retention

- 1. Section 6001 of the Code provides the general rule for the proper retention of records for federal tax purposes. The IRS regularly advises taxpayers to maintain sufficient records to support their tax deductions, credits and exclusions. In the case of a tax-exempt bond transaction, the primary taxpayers are the bondholders. In the case of other tax benefited bonds, such as “build America bonds” or “recovery zone economic development bonds”, the Issuer will be treated as the taxpayer. In order to ensure the continued exclusion of interest to such bondholders, it is important that the Issuer retain sufficient records to support such exclusion.

2. In General

- a. All records associated with any bond issue shall be stored electronically or in hard copy form at the Issuer’s offices or at another location conveniently accessible to the Issuer.
- b. The Compliance Officer will ensure that the Issuer provides for appropriate storage of these records.
- c. If storing documents electronically, the Issuer shall conform with Rev. Proc. 97-22, 1997-1 C.B. 652 (as the same may be amended, supplemented or superseded), which provides guidance on maintaining books and records by using an electronic storage system. Bond counsel can furnish a copy of this Revenue Procedure if needed.

¹ Generally, rebate payments must be paid not later than 60 days after retirement of the last bond in the issue.

3. **Bonds** – Unless a longer period of time is required by state law, the Issuer shall maintain the bond record as defined in this section for the longer of the life of the bonds plus 3 years or the life of refunding bonds (or series of refunding bonds) which refunded the bonds plus 3 years. The bond record shall include the following documents:

a. Pre-Issuance Documents

- i. **Guaranteed Investment Contracts (“GICs”) and Investments (other than Treasury’s State and Local Government Series Securities, “SLGs”)** – If applicable, the Compliance Officer shall retain all documentation regarding the procurement of each GIC or other investment acquired on or before the date of bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules. If SLGs are purchased, a copy of the final subscription shall be maintained.
- ii. **Project Draw Schedule** – The Compliance Officer shall retain all documentation and calculations relating to the draw schedule used to meet the “reasonable expectations” test and use of proceeds tests (including copies of contracts with general and sub-contractors or summaries thereof).
- iii. **Issue Sizing** – The Compliance Officer shall maintain a copy of all financial advisor’s or underwriter’s structuring information.
- iv. **Bond Insurance** – If procured by the Issuer, the Compliance Officer shall maintain a copy of insurance quotes and calculations supporting the cost benefit of bond insurance, if any.
- v. **Costs of Issuance documentation** – The Compliance Officer shall retain all invoices, payments and certificates related to costs of issuance of the bonds.

- b. Issuance Documents** – The Compliance Officer shall retain the bound bond transcript delivered from bond counsel.

c. Post-Issuance Documents

- i. **Post-Issuance Guaranteed Investment Contracts and Investments (Other than SLGs)** – the Compliance Officer shall retain all documentation regarding the procurement of any GIC or other investment acquired after bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an

explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules.

- ii. **Records of Investments** shall be retained by the Compliance Officer.
- iii. **Investment Activity Statements** shall be retained by the Compliance Officer.
- iv. **Records of Expenditures** – The Compliance Officer shall maintain or shall cause to be maintained all invoices, etc. relating to equipment purchases and constructed or acquired projects, either electronically or in hard copy.
- v. **Records of Compliance**
 - **Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bond Documentation** – The Compliance Officer shall prepare the annual analysis described in Section II(B)(2) above and maintain these records.
 - **Arbitrage Rebate Reports** may be prepared by the Compliance Officer or a third party as described in section II (B)(3) of this document and retained by the Compliance Officer.
 - **Returns and Payment** – Shall be prepared at the direction of the Compliance Officer and filed as described in Section II(B)(3) of this document.
 - **Contracts under which any bond proceeds are spent (consulting engineering, acquisition, construction, etc.)** – The Compliance Officer shall obtain copies of these contracts and retain them for the bond record.

d. General

- i. **Audited Financial Statements** – The Compliance Officer will maintain copies of the Issuer’s annual audited Financial Statements.
- ii. **Reports of any prior IRS Examinations** – The Compliance Officer will maintain copies of any written materials pertaining to any IRS examination of the Issuer’s bonds.

III. Voluntarily Correcting Failures to Comply with Post-Issuance Compliance Activities

If, in the effort to exercise due diligence in complying with applicable federal tax laws, a potential violation is discovered, the Issuer may address the violation through the applicable method listed below. The Issuer should work with its bond counsel to determine the appropriate way to proceed.

A. Taking remedial actions as described in Section 141 of the Internal Revenue Code

B. Utilizing the Voluntary Closing Agreement Program (VCAP) – Section 7.2.3 of the Internal Revenue Manual establishes the voluntary closing agreement program for tax-exempt

bonds (TEB VCAP) whereby issuers of tax-exempt bonds can resolve violations of the Internal Revenue Code through closing agreements with the Internal Revenue Service.

IV. Post Issuance Tax Compliance Procedures Review

The Compliance Officer shall review these procedures at least annually, and implement revisions or updates as deemed appropriate, in consultation with bond counsel.

Exhibit A

POST ISSUANCE COMPLIANCE NOTES
[Name of Bond]

Transaction Parties

Overall Responsible Party for Debt Management Activities _____
Bond Counsel _____
Paying Agent _____
Rebate Specialist _____
Other _____

EXHIBIT A

\$11,355,000

**Town of Arlington, Massachusetts
General Obligation Municipal Purpose Loan of 2025 Bonds
Dated February 27, 2025**

ISSUE PRICE CERTIFICATE AND RECEIPT

The undersigned, on behalf of the Successful Bidder, hereby certifies as set forth below with respect to the sale of the above-captioned obligations (“Issue”) of the Issuer. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit A is attached.

1. Reasonably Expected Initial Offering Prices.

(a) As of the Sale Date, the reasonably expected initial offering prices of the bonds of the Issue to the Public by the Successful Bidder are the prices listed in Schedule A (“Expected Offering Prices”). The Expected Offering Prices are the prices for the bonds of the Issue used by the Successful Bidder in formulating its bid to purchase the Issue. Reflected in Schedule B is a true and correct representation of the bid provided by the Successful Bidder to purchase the Issue.

(b) The Successful Bidder was not given the opportunity to review other bids prior to submitting its bid.

(c) The bid submitted by the Successful Bidder constituted a firm offer to purchase the bonds of the Issue.

2. Receipt. The Successful Bidder hereby acknowledges receipt of the bonds of the Issue from the Issuer and further acknowledges receipt of all certificates, opinions and other documents required to be delivered to the Successful Bidder, before or simultaneously with the delivery of such bonds of the Issue, which certificates, opinions and other documents are satisfactory to the Successful Bidder.

[Remainder of page intentionally left blank; signature page follows.]

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Successful Bidder's interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, the preparation of the Internal Revenue Service Form 8038-G, and other federal income tax advice that it may give to the Issuer from time to time relating to the Issue.

Dated: February 27, 2025

FIDELITY CAPITAL MARKETS, A
DIVISION OF NATIONAL FINANCIAL
SERVICES LLC

By: _____
Name:
Title:

SCHEDULE A TO EXHIBIT A

EXPECTED INITIAL OFFERING PRICES TO THE PUBLIC

Bond Component	Maturity Date	Amount	Rate	Yield	Price	Call Date	Call Price	Premium (-Discount)
Bond Component:								
	02/01/2026	235,000	5.000%	2.430%	102.341	-	-	5,501.35
	02/01/2027	640,000	5.000%	2.450%	104.771	-	-	30,534.40
	02/01/2028	645,000	5.000%	2.480%	107.072	-	-	45,614.40
	02/01/2029	640,000	5.000%	2.500%	109.295	-	-	59,488.00
	02/01/2030	640,000	5.000%	2.530%	111.374	-	-	72,793.60
	02/01/2031	590,000	5.000%	2.540%	113.456	-	-	79,390.40
	02/01/2032	580,000	5.000%	2.570%	115.329	-	-	88,908.20
	02/01/2033	555,000	5.000%	2.620%	116.935	-	-	93,989.25
	02/01/2034	555,000	5.000%	2.660%	118.484	-	-	102,586.20
	02/01/2035	550,000	4.000%	2.750%	109.834	C 02/01/2034	100.000	54,087.00
	02/01/2036	345,000	4.000%	2.800%	109.419	C 02/01/2034	100.000	32,495.55
	02/01/2037	350,000	4.000%	2.900%	108.595	C 02/01/2034	100.000	30,082.50
	02/01/2038	350,000	4.000%	2.990%	107.860	C 02/01/2034	100.000	27,510.00
	02/01/2039	350,000	4.000%	3.100%	106.970	C 02/01/2034	100.000	24,395.00
	02/01/2040	355,000	4.000%	3.250%	105.769	C 02/01/2034	100.000	20,479.95
	02/01/2041	250,000	4.000%	3.390%	104.663	C 02/01/2034	100.000	11,657.50
	02/01/2042	255,000	4.000%	3.580%	103.183	C 02/01/2034	100.000	8,116.65
	02/01/2043	265,000	4.000%	3.750%	101.879	C 02/01/2034	100.000	4,979.35
	02/01/2044	270,000	4.000%	3.840%	101.197	C 02/01/2034	100.000	3,231.90
	02/01/2045	280,000	4.000%	4.000%	100.000	-	-	-
		8,700,000						795,841.20
TERM1:								
	02/01/2051	1,520,000	4.000%	4.090%	98.567	-	-	(21,781.60)
SERIAL2:								
	02/01/2052	265,000	4.000%	4.100%	98.376	-	-	(4,303.60)
	02/01/2053	280,000	4.000%	4.110%	98.180	-	-	(5,096.00)
	02/01/2054	290,000	4.000%	4.120%	97.980	-	-	(5,858.00)
	02/01/2055	300,000	4.000%	4.130%	97.775	-	-	(6,675.00)
		1,135,000						(21,932.60)
		11,355,000						752,127.00

Dated Date	02/27/2025	
Delivery Date	02/27/2025	
First Coupon	08/01/2025	
Par Amount	11,355,000.00	
Premium	752,127.00	
Production	12,107,127.00	106.623752%
Underwriter's Discount	(27,092.70)	(0.238597%)
Purchase Price	12,080,034.30	106.385155%
Accrued Interest	-	
Net Proceeds	12,080,034.30	

SCHEDULE B TO EXHIBIT A

SUCCESSFUL BIDDER'S BID

Fidelity Capital Markets - Boston , MA's Bid



Arlington (Town) \$11,975,000 General Obligation Municipal Purpose Loan of 2025 Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,737,348.85, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5000	109.295
02/01/2030	750M	5.0000	2.5300	111.374
02/01/2031	590M	5.0000	2.5400	113.456
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6200	116.935
02/01/2034	560M	5.0000	2.6600	118.484
02/01/2035	555M	4.0000	2.7500	109.834
02/01/2036	345M	4.0000	2.8000	109.419
02/01/2037	350M	4.0000	2.9000	108.595
02/01/2038	355M	4.0000	2.9900	107.860
02/01/2039	355M	4.0000	3.1000	106.970
02/01/2040	360M	4.0000	3.2500	105.769
02/01/2041	255M	4.0000	3.3900	104.663
02/01/2042	260M	4.0000	3.5800	103.183
02/01/2043	265M	4.0000	3.7500	101.879
02/01/2044	275M	4.0000	3.8400	101.197
02/01/2045	280M	4.0000	4.0000	100.000
02/01/2046				
02/01/2047				
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,560M	4.0000	4.0900	98.567
02/01/2052	275M	4.0000	4.1000	98.376
02/01/2053	285M	4.0000	4.1100	98.180
02/01/2054	295M	4.0000	4.1200	97.980
02/01/2055	305M	4.0000	4.1300	97.775

Total Interest Cost: \$6,255,361.11
Premium: \$762,348.85
Net Interest Cost: \$5,493,012.26
TIC: 3.532164
Time Last Bid Received On:02/05/2025 10:59:43 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

EXHIBIT B

\$11,355,000

Town of Arlington, Massachusetts

General Obligation Municipal Purpose Loan of 2025 Bonds

Dated February 27, 2025

CERTIFICATE OF THE MUNICIPAL ADVISOR

The undersigned, on behalf of the Municipal Advisor, has assisted the Issuer in soliciting and receiving bids from potential underwriters in connection with the sale of the bonds of the Issue in a competitive bidding process in which bids were requested for the purchase of such bonds at specified written terms set forth in the Notice of Sale, a copy of which is attached to this certificate as Attachment 1. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit B is attached. The competitive sale requirements (as defined in the Notice of Sale) for the Issue were met. The Municipal Advisor further advises as follows:

1. The bonds of the Issue were offered for sale at specified written terms more particularly described in the Notice of Sale, which was distributed to potential bidders.

2. The Notice of Sale dated January 29, 2025 was disseminated electronically through PARITY on January 30, 2025 and revised on January 31, 2025. The method of distribution of the Notice of Sale is regularly used for purposes of disseminating notices of sale of new issuances of municipal bonds, and notices disseminated in such manner are widely available to potential bidders.

3. To the knowledge of the Municipal Advisor, all bidders were offered an equal opportunity to bid to purchase the bonds of the Issue so that, for example, if the bidding process afforded any opportunity for bidders to review other bids before providing a bid, no bidder was given an opportunity to review other bids that was not equally given to all other bidders (that is, no exclusive “last-look”).

4. The Issuer received bids for the bonds of the Issue from at least three Underwriters who represented that they have established industry reputations for underwriting new issuances of municipal bonds. Based upon the Municipal Advisor’s knowledge and experience in acting as the Municipal Advisor for other municipal issues, the Municipal Advisor believes those representations to be accurate. Copies of any written bids received are attached to this certificate as Attachment 2. Bids not reflected in Attachment 2, if any, were received by telephone rather than in writing.

5. The winning bidder for the bonds of the Issue was the Successful Bidder, whose bid was determined to be the best conforming bid in accordance with the terms set forth in the Notice of Sale, as shown in the bid comparison attached as Attachment 3 to this certificate. The Issuer awarded the bonds of the Issue to the Successful Bidder.

6. The Yield on the Issue is 3.4808293493% as shown on the attached Schedule A.

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Municipal Advisor's interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

[Remainder of page intentionally left blank; signature page follows.]

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate to which this certificate is attached and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, in the preparation of the Internal Revenue Service Form 8038-G, and in providing other federal income tax advice that it may give to the Issuer from time to time relating to the Issue. The Issuer and Troutman Pepper Locke LLP may also rely on the foregoing information for purposes of determining compliance with Section 21A of Chapter 44 of the Massachusetts General Laws, if applicable. No other Persons may rely on the representations set forth in this certificate without the prior written consent of the Municipal Advisor.

Dated: February 27, 2025

HILLTOP SECURITIES INC.

By: _____
Name:
Title:

ATTACHMENT 1 TO EXHIBIT B

NOTICE OF SALE

ATTACHMENT 2 TO EXHIBIT B
COPIES OF WRITTEN BIDS RECEIVED

Fidelity Capital Markets - Boston , MA's Bid



Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,737,348.85, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5000	109.295
02/01/2030	750M	5.0000	2.5300	111.374
02/01/2031	590M	5.0000	2.5400	113.456
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6200	116.935
02/01/2034	560M	5.0000	2.6600	118.484
02/01/2035	555M	4.0000	2.7500	109.834
02/01/2036	345M	4.0000	2.8000	109.419
02/01/2037	350M	4.0000	2.9000	108.595
02/01/2038	355M	4.0000	2.9900	107.860
02/01/2039	355M	4.0000	3.1000	106.970
02/01/2040	360M	4.0000	3.2500	105.769
02/01/2041	255M	4.0000	3.3900	104.663
02/01/2042	260M	4.0000	3.5800	103.183
02/01/2043	265M	4.0000	3.7500	101.879
02/01/2044	275M	4.0000	3.8400	101.197
02/01/2045	280M	4.0000	4.0000	100.000
02/01/2046				
02/01/2047				
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,560M	4.0000	4.0900	98.567
02/01/2052	275M	4.0000	4.1000	98.376
02/01/2053	285M	4.0000	4.1100	98.180
02/01/2054	295M	4.0000	4.1200	97.980
02/01/2055	305M	4.0000	4.1300	97.775

Total Interest Cost: \$6,255,361.11
Premium: \$762,348.85
Net Interest Cost: \$5,493,012.26
TIC: 3.532164
Time Last Bid Received On:02/05/2025 10:59:43 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.



Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,706,545.55, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4000	102.369
02/01/2027	750M	5.0000	2.4600	104.751
02/01/2028	750M	5.0000	2.5000	107.013
02/01/2029	745M	5.0000	2.5200	109.217
02/01/2030	750M	5.0000	2.5500	111.276
02/01/2031	590M	5.0000	2.5700	113.280
02/01/2032	580M	5.0000	2.5800	115.260
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.7600	109.751
02/01/2036	345M	4.0000	2.8100	109.336
02/01/2037	350M	4.0000	2.9500	108.186
02/01/2038	355M	4.0000	3.0100	107.698
02/01/2039	355M	4.0000	3.1200	106.809
02/01/2040	360M	4.0000	3.2500	105.769
02/01/2041	255M	4.0000	3.3800	104.741
02/01/2042	260M	4.0000	3.5300	103.570
02/01/2043	265M	4.0000	3.6600	102.567
02/01/2044	275M	4.0000	3.7700	101.727
02/01/2045	280M	4.0000	3.8700	100.971
02/01/2046	240M	4.0000	3.9700	100.221
02/01/2047	250M	4.0000	4.0300	99.563
02/01/2048	260M	4.0000	4.0400	99.403
02/01/2049	270M	4.0000	4.0500	99.235
02/01/2050	275M	4.0000	4.0600	99.062
02/01/2051	265M	4.0000	4.0800	98.724
02/01/2052	275M	4.0000	4.0900	98.536
02/01/2053	285M	4.0000	4.1100	98.180
02/01/2054	295M	4.0000	4.1100	98.146
02/01/2055	305M	4.0000	4.1100	98.113

Total Interest Cost: \$6,255,361.11
Premium: \$731,545.55
Net Interest Cost: \$5,523,815.56
TIC: 3.558967
Time Last Bid Received On:02/05/2025 10:47:27 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,695,108.00, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4000	102.369
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5000	109.295
02/01/2030	750M	5.0000	2.5200	111.423
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6000	117.091
02/01/2034	560M	5.0000	2.6500	118.572
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.9000	108.595
02/01/2037	350M	4.0000	3.0000	107.779
02/01/2038	355M	4.0000	3.1000	106.970
02/01/2039	355M	4.0000	3.2000	106.168
02/01/2040	360M	4.0000	3.3000	105.372
02/01/2041	255M	4.0000	3.4500	104.193
02/01/2042	260M	4.0000	3.6000	103.028
02/01/2043	265M	4.0000	3.7000	102.261
02/01/2044	275M	4.0000	3.8000	101.499
02/01/2045	280M	4.0000	3.9000	100.745
02/01/2046	240M	4.0000	3.9500	100.370
02/01/2047	250M	4.0000	4.0000	100.000
02/01/2048	260M	4.0000	4.0300	99.551
02/01/2049	270M	4.0000	4.0500	99.235
02/01/2050				
02/01/2051	540M	4.0000	4.0700	98.882
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.0000	4.1200	97.944

Total Interest Cost: \$6,255,361.11
Premium: \$720,108.00
Net Interest Cost: \$5,535,253.11
TIC: 3.568947
Time Last Bid Received On: 02/05/2025 10:59:51 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,697,707.75, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	5.0000	2.9000	116.411
02/01/2037	350M	4.0000	3.0000	107.779
02/01/2038	355M	4.0000	3.1500	106.568
02/01/2039	355M	4.0000	3.2800	105.531
02/01/2040	360M	4.0000	3.4000	104.584
02/01/2041	255M	4.0000	3.5500	103.415
02/01/2042	260M	4.0000	3.7000	102.261
02/01/2043	265M	4.0000	3.8000	101.499
02/01/2044	275M	4.0000	3.8500	101.121
02/01/2045	280M	4.0000	3.9000	100.745
02/01/2046	240M	4.0000	4.0000	100.000
02/01/2047	250M	4.0000	4.0500	99.275
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,070M	4.0000	4.1500	97.629
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.0000	4.2000	96.608

Total Interest Cost: \$6,293,061.94

Premium: \$722,707.75

Net Interest Cost: \$5,570,354.19

TIC: 3.593755

Time Last Bid Received On: 02/05/2025 10:55:14 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,777,310.70, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.3800	102.388
02/01/2027	750M	5.0000	2.4000	104.867
02/01/2028	750M	5.0000	2.4300	107.218
02/01/2029	745M	5.0000	2.4600	109.452
02/01/2030	750M	5.0000	2.5000	111.521
02/01/2031	590M	5.0000	2.5200	113.574
02/01/2032	580M	5.0000	2.5300	115.603
02/01/2033	555M	5.0000	2.6100	117.013
02/01/2034	560M	5.0000	2.6600	118.484
02/01/2035	555M	5.0000	2.7200	117.962
02/01/2036	345M	5.0000	2.8000	117.270
02/01/2037	350M	5.0000	2.8400	116.925
02/01/2038	355M	4.0000	3.1000	106.970
02/01/2039	355M	4.0000	3.2300	105.928
02/01/2040	360M	4.0000	3.3800	104.741
02/01/2041	255M	4.0000	3.5400	103.492
02/01/2042	260M	4.0000	3.6700	102.490
02/01/2043	265M	4.0000	3.8000	101.499
02/01/2044	275M	4.0000	3.9000	100.745
02/01/2045	280M	4.0000	3.9500	100.370
02/01/2046				
02/01/2047	490M	4.0000	4.0700	98.988
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,070M	4.0000	4.1400	97.784
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.0000	4.1700	97.106

Total Interest Cost: \$6,389,908.33
Premium: \$802,310.70
Net Interest Cost: \$5,587,597.63
TIC: 3.593851
Time Last Bid Received On: 02/05/2025 10:49:02 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,694,562.30, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.5100	102.267
02/01/2027	750M	5.0000	2.5200	104.636
02/01/2028	750M	5.0000	2.5400	106.896
02/01/2029	745M	5.0000	2.5700	109.021
02/01/2030	750M	5.0000	2.6000	111.031
02/01/2031	590M	5.0000	2.6200	112.986
02/01/2032	580M	5.0000	2.6300	114.918
02/01/2033	555M	5.0000	2.6500	116.702
02/01/2034	560M	5.0000	2.7500	117.702
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.8900	108.678
02/01/2037	350M	4.0000	2.9800	107.942
02/01/2038	355M	4.0000	3.0900	107.050
02/01/2039	355M	4.0000	3.2000	106.168
02/01/2040	360M	4.0000	3.3600	104.899
02/01/2041	255M	4.0000	3.5300	103.570
02/01/2042	260M	4.0000	3.7000	102.261
02/01/2043	265M	4.0000	3.8300	101.272
02/01/2044	275M	4.0000	3.9200	100.595
02/01/2045	280M	4.0000	3.9900	100.072
02/01/2046	240M	4.0000	4.0400	99.436
02/01/2047	250M	4.0000	4.0800	98.845
02/01/2048				
02/01/2049				
02/01/2050	805M	4.0000	4.1100	98.291
02/01/2051				
02/01/2052	540M	4.1250	4.1500	99.594
02/01/2053				
02/01/2054				
02/01/2055	885M	4.1250	4.1600	99.401

Total Interest Cost: \$6,305,232.47
Premium: \$719,562.30
Net Interest Cost: \$5,585,670.17
TIC: 3.596770
Time Last Bid Received On: 02/05/2025 10:59:47 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,691,288.95, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.5100	102.267
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5700	109.021
02/01/2030	750M	5.0000	2.6000	111.031
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.7000	116.313
02/01/2034	560M	5.0000	2.7500	117.702
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.9100	108.513
02/01/2037	350M	4.0000	2.9500	108.186
02/01/2038	355M	4.0000	3.0500	107.374
02/01/2039	355M	4.0000	3.2000	106.168
02/01/2040	360M	4.0000	3.4000	104.584
02/01/2041	255M	4.0000	3.5500	103.415
02/01/2042	260M	4.0000	3.7000	102.261
02/01/2043	265M	4.0000	3.8500	101.121
02/01/2044	275M	4.0000	4.0000	100.000
02/01/2045	280M	4.0000	4.0200	99.725
02/01/2046				
02/01/2047	490M	4.0000	4.0500	99.275
02/01/2048				
02/01/2049				
02/01/2050	805M	4.0000	4.1000	98.445
02/01/2051				
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,425M	4.1250	4.1800	99.063

Total Interest Cost: \$6,305,232.47
Premium: \$716,288.95
Net Interest Cost: \$5,588,943.52
TIC: 3.599632
Time Last Bid Received On: 02/05/2025 10:54:26 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,658,299.85, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.9000	108.595
02/01/2037	350M	4.0000	3.0000	107.779
02/01/2038	355M	4.0000	3.1000	106.970
02/01/2039	355M	4.0000	3.2000	106.168
02/01/2040	360M	4.0000	3.3500	104.977
02/01/2041	255M	4.0000	3.4500	104.193
02/01/2042	260M	4.0000	3.6000	103.028
02/01/2043	265M	4.0000	3.7000	102.261
02/01/2044	275M	4.0000	3.7500	101.879
02/01/2045	280M	4.0000	3.8500	101.121
02/01/2046	240M	4.0000	3.9500	100.370
02/01/2047	250M	4.0000	4.0000	100.000
02/01/2048	260M	4.0000	4.0500	99.255
02/01/2049	270M	4.0000	4.1000	98.482
02/01/2050	275M	4.0000	4.1100	98.291
02/01/2051	265M	4.0000	4.1200	98.096
02/01/2052	275M	4.0000	4.1300	97.896
02/01/2053	285M	4.0000	4.1400	97.692
02/01/2054	295M	4.0000	4.1500	97.484
02/01/2055	305M	4.0000	4.1600	97.273

Total Interest Cost: \$6,255,361.11

Premium: \$683,299.85

Net Interest Cost: \$5,572,061.26

TIC: 3.601169

Time Last Bid Received On: 02/05/2025 10:59:33 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,728,909.35, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	5.0000	2.7500	117.702
02/01/2036	345M	5.0000	2.8000	117.270
02/01/2037	350M	4.0000	3.0000	107.779
02/01/2038	355M	4.0000	3.0700	107.212
02/01/2039	355M	4.0000	3.1500	106.568
02/01/2040	360M	4.0000	3.2500	105.769
02/01/2041	255M	4.0000	3.4000	104.584
02/01/2042	260M	4.0000	3.5500	103.415
02/01/2043	265M	4.0000	3.7000	102.261
02/01/2044	275M	4.0000	3.8500	101.121
02/01/2045	280M	4.0000	4.0000	100.000
02/01/2046	240M	4.0000	4.0200	99.716
02/01/2047	250M	4.0000	4.0400	99.419
02/01/2048	260M	4.0000	4.0600	99.107
02/01/2049	270M	4.0000	4.0800	98.782
02/01/2050	275M	4.0000	4.1000	98.445
02/01/2051	265M	4.0000	4.1100	98.253
02/01/2052	275M	4.0000	4.1200	98.056
02/01/2053	285M	4.0000	4.1300	97.854
02/01/2054	295M	4.0000	4.1400	97.649
02/01/2055	305M	4.0000	4.1500	97.440

Total Interest Cost: \$6,348,161.11
Premium: \$753,909.35
Net Interest Cost: \$5,594,251.76
TIC: 3.606697
Time Last Bid Received On: 02/05/2025 10:45:18 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,646,114.00, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6500	116.702
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.9500	108.186
02/01/2037	350M	4.0000	3.1000	106.970
02/01/2038	355M	4.0000	3.2000	106.168
02/01/2039	355M	4.0000	3.4000	104.584
02/01/2040	360M	4.0000	3.5000	103.803
02/01/2041	255M	4.0000	3.7000	102.261
02/01/2042	260M	4.0000	3.8500	101.121
02/01/2043	265M	4.0000	3.9500	100.370
02/01/2044	275M	4.0000	4.0000	100.000
02/01/2045	280M	4.0000	4.0800	98.913
02/01/2046	240M	4.0000	4.1000	98.601
02/01/2047				
02/01/2048	510M	4.0000	4.1500	97.792
02/01/2049				
02/01/2050				
02/01/2051	810M	4.0000	4.1800	97.164
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.1250	4.2500	97.891

Total Interest Cost: \$6,296,643.89
Premium: \$671,114.00
Net Interest Cost: \$5,625,529.89
TIC: 3.634393
Time Last Bid Received On: 02/05/2025 10:55:36 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,661,645.10, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4600	102.313
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5400	109.138
02/01/2030	750M	5.0000	2.5700	111.178
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6700	116.546
02/01/2034	560M	5.0000	2.7200	117.962
02/01/2035	555M	4.0000	2.8300	109.171
02/01/2036	345M	4.0000	2.8800	108.760
02/01/2037	350M	4.0000	2.9800	107.942
02/01/2038	355M	4.0000	3.1000	106.970
02/01/2039	355M	4.0000	3.2300	105.928
02/01/2040	360M	4.0000	3.4300	104.349
02/01/2041	255M	4.0000	3.5800	103.183
02/01/2042	260M	4.0000	3.7200	102.108
02/01/2043	265M	4.0000	3.8500	101.121
02/01/2044	275M	4.0000	3.9500	100.370
02/01/2045	280M	4.0000	4.0200	99.725
02/01/2046	240M	4.0000	4.1000	98.601
02/01/2047	250M	4.0000	4.1500	97.851
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,070M	4.1250	4.2000	98.819
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.1250	4.3000	97.066

Total Interest Cost: \$6,329,328.54
Premium: \$686,645.10
Net Interest Cost: \$5,642,683.44
TIC: 3.639660
Time Last Bid Received On: 02/05/2025 10:59:30 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,613,838.05, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	2.9000	108.595
02/01/2037	350M	4.0000	3.0000	107.779
02/01/2038	355M	4.0000	3.1500	106.568
02/01/2039	355M	4.0000	3.2800	105.531
02/01/2040	360M	4.0000	3.4300	104.349
02/01/2041	255M	4.0000	3.5700	103.260
02/01/2042	260M	4.0000	3.7100	102.184
02/01/2043	265M	4.0000	3.8200	101.348
02/01/2044				
02/01/2045				
02/01/2046	795M	4.0000	4.0500	99.296
02/01/2047				
02/01/2048				
02/01/2049				
02/01/2050	1,055M	4.0000	4.1300	97.985
02/01/2051				
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,425M	4.0000	4.2000	96.608

Total Interest Cost: \$6,255,361.11
Premium: \$638,838.05
Net Interest Cost: \$5,616,523.06
TIC: 3.640304
Time Last Bid Received On: 02/05/2025 10:58:58 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,597,423.85, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4500	102.323
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5700	109.021
02/01/2030	750M	5.0000	2.6000	111.031
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6600	116.624
02/01/2034	560M	5.0000	2.7500	117.702
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	4.0000	3.0000	107.779
02/01/2037	350M	4.0000	3.1500	106.568
02/01/2038	355M	4.0000	3.2500	105.769
02/01/2039	355M	4.0000	3.3500	104.977
02/01/2040	360M	4.0000	3.5000	103.803
02/01/2041	255M	4.0000	3.6000	103.028
02/01/2042	260M	4.0000	3.7500	101.879
02/01/2043	265M	4.0000	3.8500	101.121
02/01/2044	275M	4.0000	3.9000	100.745
02/01/2045	280M	4.0000	4.0000	100.000
02/01/2046				
02/01/2047				
02/01/2048				
02/01/2049				
02/01/2050	1,295M	4.0000	4.1200	98.138
02/01/2051				
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,425M	4.0000	4.2000	96.608

Total Interest Cost: \$6,255,361.11
Premium: \$622,423.85
Net Interest Cost: \$5,632,937.26
TIC: 3.654811
Time Last Bid Received On: 02/05/2025 10:59:51 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,592,476.80, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4500	102.323
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8500	109.006
02/01/2036	345M	4.0000	2.9400	108.268
02/01/2037	350M	4.0000	3.0300	107.536
02/01/2038	355M	4.0000	3.1500	106.568
02/01/2039	355M	4.0000	3.3000	105.372
02/01/2040	360M	4.0000	3.4500	104.193
02/01/2041	255M	4.0000	3.6000	103.028
02/01/2042	260M	4.0000	3.7700	101.727
02/01/2043	265M	4.0000	3.9500	100.370
02/01/2044	275M	4.0000	4.0000	100.000
02/01/2045	280M	4.0000	4.0500	99.318
02/01/2046	240M	4.0000	4.1000	98.601
02/01/2047	250M	4.0000	4.1500	97.851
02/01/2048				
02/01/2049				
02/01/2050				
02/01/2051	1,070M	4.0000	4.2000	96.856
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,160M	4.0000	4.2500	95.785

Total Interest Cost: \$6,255,361.11
Premium: \$617,476.80
Net Interest Cost: \$5,637,884.31
TIC: 3.659190
Time Last Bid Received On: 02/05/2025 10:46:52 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Arlington (Town)
\$11,975,000 General Obligation Municipal Purpose Loan of 2025
Bonds

For the aggregate principal amount of \$11,975,000.00, we will pay you \$12,631,467.30, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/01/2026	320M	5.0000	2.4300	102.341
02/01/2027	750M	5.0000	2.4500	104.771
02/01/2028	750M	5.0000	2.4800	107.072
02/01/2029	745M	5.0000	2.5100	109.256
02/01/2030	750M	5.0000	2.5400	111.325
02/01/2031	590M	5.0000	2.5600	113.338
02/01/2032	580M	5.0000	2.5700	115.329
02/01/2033	555M	5.0000	2.6400	116.780
02/01/2034	560M	5.0000	2.6900	118.223
02/01/2035	555M	4.0000	2.8100	109.336
02/01/2036	345M	5.0000	2.9000	116.411
02/01/2037	350M	4.0000	3.0400	107.454
02/01/2038	355M	4.0000	3.1500	106.568
02/01/2039	355M	4.0000	3.3500	104.977
02/01/2040	360M	4.0000	3.6000	103.028
02/01/2041	255M	4.0000	3.8000	101.499
02/01/2042	260M	4.0000	3.9500	100.370
02/01/2043	265M	4.0000	4.0000	100.000
02/01/2044	275M	4.0000	4.0500	99.340
02/01/2045	280M	4.0000	4.1000	98.644
02/01/2046				
02/01/2047				
02/01/2048				
02/01/2049	1,020M	4.0000	4.2500	96.265
02/01/2050				
02/01/2051				
02/01/2052				
02/01/2053				
02/01/2054				
02/01/2055	1,700M	4.1250	4.3500	96.251

Total Interest Cost: \$6,351,502.22
Premium: \$656,467.30
Net Interest Cost: \$5,695,034.92
TIC: 3.684312
Time Last Bid Received On: 02/05/2025 10:51:34 EST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

ATTACHMENT 3 TO EXHIBIT B

BID COMPARISON

Bid Results

Arlington (Town) \$11,975,000 General Obligation Municipal Purpose Loan of 2025 Bonds

The following bids were submitted using **PARITY**[®] and displayed ranked by lowest TIC.
Click on the name of each bidder to see the respective bids.

Bid Award*	Bidder Name	TIC
<input type="checkbox"/>	Fidelity Capital Markets	3.532164
<input type="checkbox"/>	TD Securities	3.558967
<input type="checkbox"/>	Loop Capital Markets, LLC	3.568947
<input type="checkbox"/>	Janney Montgomery Scott LLC	3.593755
<input type="checkbox"/>	KeyBanc Capital Markets	3.593851
<input type="checkbox"/>	Brownstone Investment Group, LLC	3.596770
<input type="checkbox"/>	BNYMellon Capital Markets	3.599632
<input type="checkbox"/>	Roosevelt & Cross, Inc.	3.601169
<input type="checkbox"/>	Robert W. Baird & Co., Inc.	3.606697
<input type="checkbox"/>	UBS Financial Services Inc.	3.634393
<input type="checkbox"/>	Huntington Securities, Inc.	3.639660
<input type="checkbox"/>	FHN Financial Capital Markets	3.640304
<input type="checkbox"/>	Bancroft Capital, LLC	3.654811
<input type="checkbox"/>	Mesirow Financial, Inc.	3.659190
<input type="checkbox"/>	UMB Bank, N.A.	3.684312

*Awarding the Bonds to a specific bidder will provide you with the Reoffering Prices and Yields.

SCHEDULE A TO EXHIBIT B

PROOF OF YIELD ON THE ISSUE

Town of Arlington, Massachusetts
General Obligation Municipal Purpose Loan of 2025 Bonds dated February 27, 2025

Date	Debt Service	Total	Present Value to 02/27/2025 @ 3.4808293493%
08/01/2025	216,027.78	216,027.78	212,862.17
02/01/2026	487,500.00	487,500.00	472,139.14
08/01/2026	246,625.00	246,625.00	234,768.04
02/01/2027	886,625.00	886,625.00	829,561.05
08/01/2027	230,625.00	230,625.00	212,090.52
02/01/2028	875,625.00	875,625.00	791,479.24
08/01/2028	214,500.00	214,500.00	190,570.28
02/01/2029	854,500.00	854,500.00	746,184.86
08/01/2029	198,500.00	198,500.00	170,373.24
02/01/2030	838,500.00	838,500.00	707,376.17
08/01/2030	182,500.00	182,500.00	151,327.11
02/01/2031	772,500.00	772,500.00	629,591.48
08/01/2031	167,750.00	167,750.00	134,378.37
02/01/2032	747,750.00	747,750.00	588,748.44
08/01/2032	153,250.00	153,250.00	118,598.81
02/01/2033	708,250.00	708,250.00	538,732.19
08/01/2033	139,375.00	139,375.00	104,202.40
02/01/2034	3,499,375.00	3,499,375.00	2,571,519.48
08/01/2034	69,400.00	69,400.00	50,126.26
02/01/2035	69,400.00	69,400.00	49,268.78
08/01/2035	69,400.00	69,400.00	48,425.97
02/01/2036	69,400.00	69,400.00	47,597.57
08/01/2036	69,400.00	69,400.00	46,783.35
02/01/2037	69,400.00	69,400.00	45,983.05
08/01/2037	69,400.00	69,400.00	45,196.45
02/01/2038	69,400.00	69,400.00	44,423.30
08/01/2038	69,400.00	69,400.00	43,663.37
02/01/2039	69,400.00	69,400.00	42,916.45
08/01/2039	69,400.00	69,400.00	42,182.30
02/01/2040	69,400.00	69,400.00	41,460.71
08/01/2040	69,400.00	69,400.00	40,751.47
02/01/2041	69,400.00	69,400.00	40,054.36
08/01/2041	69,400.00	69,400.00	39,369.17
02/01/2042	69,400.00	69,400.00	38,695.70
08/01/2042	69,400.00	69,400.00	38,033.76
02/01/2043	334,400.00	334,400.00	180,128.55
08/01/2043	64,100.00	64,100.00	33,937.57
02/01/2044	334,100.00	334,100.00	173,862.43
08/01/2044	58,700.00	58,700.00	30,024.37
02/01/2045	338,700.00	338,700.00	170,277.57
08/01/2045	53,100.00	53,100.00	26,238.76
02/01/2046	288,100.00	288,100.00	139,926.03
08/01/2046	48,400.00	48,400.00	23,105.06
02/01/2047	293,400.00	293,400.00	137,666.53
08/01/2047	43,500.00	43,500.00	20,061.53
02/01/2048	298,500.00	298,500.00	135,308.65
08/01/2048	38,400.00	38,400.00	17,108.78
02/01/2049	303,400.00	303,400.00	132,864.76
08/01/2049	33,100.00	33,100.00	14,247.17
02/01/2050	298,100.00	298,100.00	126,115.71
08/01/2050	27,800.00	27,800.00	11,560.02
02/01/2051	282,800.00	282,800.00	115,584.51
08/01/2051	22,700.00	22,700.00	9,119.11
02/01/2052	287,700.00	287,700.00	113,598.62
08/01/2052	17,400.00	17,400.00	6,752.88
02/01/2053	297,400.00	297,400.00	113,445.47
08/01/2053	11,800.00	11,800.00	4,424.20
02/01/2054	301,800.00	301,800.00	111,218.86
08/01/2054	6,000.00	6,000.00	2,173.29
02/01/2055	306,000.00	306,000.00	108,941.57
	16,988,977.78	16,988,977.78	12,107,127.00

Proceeds Summary

Delivery date	02/27/2025
Par Value	11,355,000.00
Premium (Discount)	752,127.00
Target for yield calculation	12,107,127.00

PROOF OF ARBITRAGE YIELD

Town of Arlington, Massachusetts
General Obligation Municipal Purpose Loan of 2025 Bonds dated February 27, 2025

Assumed Call/Computation Dates for Premium Bonds

Bond Component	Maturity Date	Rate	Yield	Call Date	Call Price	Yield To Call/Maturity
BOND	02/01/2035	4.000%	2.750%	02/01/2034	100.000	2.7504200%
BOND	02/01/2036	4.000%	2.800%	02/01/2034	100.000	2.8004846%
BOND	02/01/2037	4.000%	2.900%	02/01/2034	100.000	2.9005489%
BOND	02/01/2038	4.000%	2.990%	02/01/2034	100.000	2.9905550%
BOND	02/01/2039	4.000%	3.100%	02/01/2034	100.000	3.1005042%
BOND	02/01/2040	4.000%	3.250%	02/01/2034	100.000	3.2505780%
BOND	02/01/2041	4.000%	3.390%	02/01/2034	100.000	3.3905516%
BOND	02/01/2042	4.000%	3.580%	02/01/2034	100.000	3.5805865%

Rejected Call/Computation Dates for Premium Bonds

Bond Component	Maturity Date	Rate	Yield	Call Date	Call Price	Yield To Call/Maturity	Increase to Yield
BOND	02/01/2035	4.000%	2.750%	-	-	2.8556041%	0.1051841%
BOND	02/01/2036	4.000%	2.800%	-	-	2.9837628%	0.1832782%
BOND	02/01/2037	4.000%	2.900%	-	-	3.1311269%	0.2305780%
BOND	02/01/2038	4.000%	2.990%	-	-	3.2506657%	0.2601106%
BOND	02/01/2039	4.000%	3.100%	-	-	3.3690578%	0.2685536%
BOND	02/01/2040	4.000%	3.250%	-	-	3.5006928%	0.2501148%
BOND	02/01/2041	4.000%	3.390%	-	-	3.6125963%	0.2220447%
BOND	02/01/2042	4.000%	3.580%	-	-	3.7446001%	0.1640136%

EXHIBIT C

SPENDING SCHEDULE

New Money Purpose	This Issue	Date of First Expenditure*	Spent By Original Issue Date 2/27/2025	Spent By 8/27/2025	Spent By 2/27/2026	Spent By 8/27/2026	Spent By 2/27/2027
Arlington High School Reconstruction	\$5,500,000	2/1/2025	\$1,000,000	\$1,500,000	\$2,000,000	\$3,000,000	\$5,500,000
Robbins Library Main Entry Masonry Renovation	\$725,000	N/A	\$0	\$225,000	\$725,000	\$725,000	\$725,000
Solid Waste Trash & Recycling Toters	\$750,000	N/A	\$0	\$750,000	\$750,000	\$750,000	\$750,000
1 Ton Dump Truck w/ Plow Sander	\$125,000	10/10/2024	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
44,000 lb GVV 4WD Truck w/ Dump Body	\$230,000	N/A	\$0	\$230,000	\$230,000	\$230,000	\$230,000
Parallel Park	\$600,000	2/20/2025	\$100,000	\$600,000	\$600,000	\$600,000	\$600,000
School Fire Alarm Upgrade	\$300,000	N/A	\$0	\$100,000	\$200,000	\$300,000	\$300,000
School Roof Top Units HVAC Upgrade	\$300,000	N/A	\$0	\$150,000	\$300,000	\$300,000	\$300,000
Bishop School Front Office Reconfiguration	\$350,000	N/A	\$0	\$350,000	\$350,000	\$350,000	\$350,000
Bishop School Envelope - Windows & Masonry	\$500,000	N/A	\$0	\$250,000	\$500,000	\$500,000	\$500,000
Brackett School Exterior Door Replacement	\$150,000	N/A	\$0	\$150,000	\$150,000	\$150,000	\$150,000
Brackett School Playground Renovation	\$800,000	10/8/2024	\$613,044	\$800,000	\$800,000	\$800,000	\$800,000
Gibbs School Additional Classrooms	\$250,000	N/A	\$0	\$125,000	\$250,000	\$250,000	\$250,000
Hardy School Roof Replacement	\$600,000	N/A	\$0	\$300,000	\$600,000	\$600,000	\$600,000
Bishop School Solar Array	\$348,000	N/A	\$0	\$200,000	\$348,000	\$348,000	\$348,000
Stratton School Main Lobby Renovation & Office Additions	\$300,000	1/22/2025	\$3,196	\$300,000	\$300,000	\$300,000	\$300,000
Student Transportation Vehicle Replacement Program	\$150,000	N/A	\$0	\$150,000	\$150,000	\$150,000	\$150,000
Totals:	\$11,978,000		\$1,841,240	\$6,305,000	\$8,378,000	\$9,478,000	\$11,978,000



Town of Arlington, Massachusetts

Minutes of Meeting: January 13, 2025

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	1.13.2025_draft_minutes.pdf	Draft 1.13.2025 Minutes



Select Board Meeting Minutes

Date: Monday, January 13, 2025

Time: 7:15PM

Location: Members of the public may access the hybrid meeting via the Select Board Chambers, Zoom, or ACMI

Present: Mr. DeCoursey, Chair, Mrs. Mahon, Vice Chair, Mr. Hurd, Mr. Diggins, Mr. Helmuth

Also Present: Mr. Feeney, Mr. Cunningham, Ms. Maher

1. Legislative Provision for Remote Participation

Mr. DeCoursey opened the meeting by stating that tonight's meeting is being conducted via Zoom, is being recorded and is also being simultaneously broadcasted on ACMI. Because all members are present, votes will be taken by voice unless a roll call is required. Persons wishing to join the meeting by Zoom may find information on how to do so on the Town's website. Persons participating by Zoom are reminded that they may be visible to others and then if you wish to participate, you are asked to provide your full name in the interest of developing a record of the meeting. Further, all participants are advised that people may be listening who do not provide comment, and those persons are not required to identify themselves. Finally, both Zoom participants and people watching on ACMI can follow the posted agenda materials, also found on the Town's website using the Novus agenda platform.

CONSENT AGENDA

2. Minutes of Meetings: December 4, 2024; December 16, 2024

3. Contractor/Drainlayer Renewal

A. Cardillo & Son, Inc.

Waltham, MA 02451

4. Acceptance of Funds

Lael Smith, For the Order of Saint Anne

5. Acceptance of Funds From Various Entities

Anna Litten, Director of Libraries

6. Mass Save Community First Partnership Grant for Electrify Arlington Program

Talia Fox, Sustainability Manager

7. Request: Special (One Day) Beer & Wine License, 01/18/2025 @ Robbins Memorial Town Hall for Private Event
Anne Ehlert

The Board thanked the number of various donors for their generosity and gratitude.

Mr. Hurd moved to approve.

SO VOTED (5-0)

APPOINTMENTS

8. Arlington Bicycle Advisory Committee

Len Greenburg (term to expire: 01/31/2028)

Mr. Greenburg appeared before the Board and noted that he has been an Arlington resident for 35 years. Mr. Greenburg is looking for ways to give back to the community and noted that he has been an at large member for the last few years on this committee and as a cyclist when the opportunity arose to become a voting member, he felt he was the right fit.

The Board thanked Mr. Greenburg for his willingness to serve and look forward to working with him in the future.

Mr. Diggins moved to approve.

SO VOTED (5-0)

9. Zoning Board of Appeals - Associate Member

Bradley Baranowski (term to expire: 01/31/2028)

Mr. Baranowski appeared before the Board and stated that he is a law professor at Boston University School of Law. Mr. Baranowski explained that he is interested in serving the community as he grew up in a small town in Ohio where his father was mayor for 16 years and developed an interest in local government and is looking for ways to give back to the community.

The Board thanked Mr. Baranowski for his willingness to serve and look forward to working with him in the future.

Mr. Hurd moved to approve.

SO VOTED (5-0)

LICENSES & PERMITS

10. For Approval: Wine & Malt Alcohol License Transfer

University Theatre PBLLC, Regent Theatre, David Malan, 7 Medford Street

Mr. Malan appeared before the Board and noted that he is the new operator of the Regent Theatre. Mr. Malan is taking over for Richard Stavros who will be retiring after 30 years. Lelan Stein will remain on staff as the director of programming and community relations as well as the bar manager. Mr. Malan noted that his vision for the space is to continue the legacy that has been the regent since 1916 while introducing more educational programming into the space.

The Board thanked Mr. Malan for choosing Arlington and looks forward to visiting the Regent soon.

Mrs. Mahon moved to approve subject to all conditions.

SO VOTED (5-0)

11. Public Entertainment License Transfer

University Theatre PBLLC, Regent Theatre, David Malan, 7 Medford Street

Mr. Hurd moved to approve subject all conditions.

SO VOTED (5-0)

12. For Approval: Common Victualler License

K Long, INC., Lucky Dragon, Shun Kit Wong, 90 Lowell Street

Mr. Wong along accompanied by his lawyer appeared before the Board noting that they are opening a new restaurant on Lowell Street which will sell Asian cuisine serving both lunch and dinner. Attorney Chin noted that they had a location in Arlington previously on Medford Street where they operated for a number of years.

Mrs. Mahon moved to approve subject to all conditions.

SO VOTED (5-0)

OPEN FORUM

A few members of the public who are religious advocates and practitioners of Falun Gong; religious freedom in China and spoke regarding their knowledge and support of the protection of the United States and encouraged members of the public to attend the Shen Yun show, which offers a glimpse into China before communism.

Kristin Anderson, thanked the Board and the Town Manager for their work with save the Alewife Brook. Ms. Anderson noted that there will be another large CSO Meeting where it is critical someone from the Town of Arlington is present.

TRAFFIC RULES & ORDERS / OTHER BUSINESS

13. For Discussion and Potential Vote: Alcohol Policy Changes

Mr. DeCoursey noted that this agenda item is before the Board for discussion and potential vote following the joint meeting with the Arlington Redevelopment Board on September 16, 2024. Mr. DeCoursey noted that there are two parts of the Alcohol Policy before the Board for discussion are as follows:

- Section II. Licensing A. Types of Licenses, Seating Capacity
 - The Board is authorized to issue two types of licenses for the sale of alcohol to be consumed on the premises: (1) All-Alcohol; and (2) Wine and Malt Beverages. All-Alcohol Licenses may be issued for restaurants having a minimum seating capacity of 50. Wine and Malt Beverage Licenses may be issued for restaurants having a minimum seating capacity of 19.
- Section II. Licensing E. Service and Consumption of Alcoholic Beverages and Food
 - Service of Food: Food service must be available in all areas in which alcoholic beverages are served. No more than two alcoholic beverages per person may be served without food. After two alcoholic beverages have

been served and consumed, a third such beverage may be served only with the delivery of food. Food must be served on solid, reusable, recyclable, or compostable dinnerware

The Board had a detailed discussion regarding the Alcohol Policy and noted that the provision that no more than two alcoholic beverages per person without food is challenging and vague in its meaning. The term “food” is not defined. The Board noted that after looking at other municipal alcohol regulations this requirement in Arlington’s provisions is unique and poses complexities for prospective food establishments. All establishments who serve alcohol must already follow other serving requirements to ensure that alcohol is offered not only legally but safely. The Board noted that at this time they did not feel comfortable removing the provisions on seating requirements.

Mr. Hurd moved to strike sentences two and three from Section E2 of the Board’s Alcohol Policy regarding that ‘No more than two alcoholic beverages per person may be served without food.’
SO VOTED (5-0)

14. Discussion & Potential Vote: Select Board Warrant Articles for Annual Town Meeting

CORRESPONDENCE RECEIVED

15. Town Manager Vacation “Buy Back”

Mrs. Mahon moved receipt and approval. SO VOTED (5-0)

NEW BUSINESS

Mr. Cunningham noted that the Annual Town Meeting Warrant closed on January 31, 2025, at 12:00p.m.

Mrs. Mahon noted that there will be an MWRA Meeting on January 22, 2025, where it is crucial to have representatives from the Town of Arlington present.

Mr. Helmuth requested an update on the very unfortunate pedestrian fatality on Dundee Road and Mass Ave back in November. Mr. Feeney gave a brief update stating that he is still not in receipt of the final investigative report or findings from the state police or the district attorney's office.

Mr. Hurd noted that there is a ‘No Parking’ sign in Arlington Heights where the post office used to be located and questioned if this due to the demand for parking in the heights if this could be looked at to be removed.

Mr. DeCoursey noted that the Conservation Commission will have a meeting regarding Mugar on Thursday, January 16, 2025. Mr. DeCoursey noted the hardship with dealing

with Republic, the Towns trash contract and noted that for the remainder of this contract to create a list for contacting them regarding missed trash and recycling pick up.

Next Scheduled Meeting of Select Board January 27, 2025

Mr. Helmuth moved to adjourn at 8:44p.m.

SO VOTED (5-0)

A true record attest.

Ashley Maher

Board Administrator

1/13/2025

Agenda Item	Documents Used
1	
2	Draft 12.4.2024 Minutes Draft 12.16.2024 Minutes
3	Memo Contractor / Drainlayer
4	Fire Dept Donation Letter
5	Accept of Funds – Libraries
6	MassSaveGrant Memo – Planning Department
7	Special (One Day) Beer & Wine License Reference
8	L. Greenburg Reference
9	B. Baranowski Reference
10	Application – Wine and Malt Transfer Inspection Reports
11	Application – Public Entertainment Inspection Reports
12	Application – Common Victualler Inspection Reports
13	Alcohol Licenses and Regulations Page 4 Page 7 Memo from Planning Department
14	

15	Memo – Town Manager
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Town of Arlington, Massachusetts

Request: Special (One Day) Beer & Wine License, 2/22/2025 @ Whittemore Robbins House for Private Event

Summary:

Hannah Halerin-Goldstein

ATTACHMENTS:

	Type	File Name	Description
📎	Reference Material	Halperin-Goldstein_H_022225_One_Day_License.pdf	Reference

OFFICE OF THE SELECT BOARD
TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

SPECIAL ALCOHOL LICENSE APPLICATION

Name of Applicant: Hanna Halperin-Goldstein

Address, phone & e-mail contact information: [REDACTED]
[REDACTED]

Name & address of Organization for which license is sought: _____

Does this Organization hold nonprofit status under the IRS Code? ☐ Yes ☒ No

Name of Responsible Manager of Organization (if different from above): _____

Christopher Geiger

Address, phone & e-mail contact information: [REDACTED]
[REDACTED]

Has the Applicant or Organization applied for and/or been granted a special liquor license this calendar year? NO If so, please give date(s) of Special Licenses and/or applications and title of event(s). _____

Is this event an annual or regular event? If so, when was the last time this event was held and at what location? One-Time Event

24-Hour contact number for Responsible Manager of Alcohol Event date: _____
[REDACTED]

Title of Event: Wedding and Reception for Hanna and Sam

Date/time of Event: February 22, 2025/4:30pm-10:30pm

Location of Event: Whittemore Robbins House

Location/Event Coordinator: Victoria Rose

Method(s) of invitation/publicity for Event: mail

Number of people expected to attend: 43

Expected admission/ticket prices: N/A

Expected prices for food and beverages (alcoholic and non-alcoholic): _____

N/A

Will persons under age 21 be on premises? There are no guests under the age of 21.

If "yes," please detail plan to prevent access of minors to alcoholic beverages. _____

N/A

Have you consulted with the Department of Police Services about your security plan for the Event? _____

Yes

OFFICE USE ONLY

For Police Chief, Operations Commander, or designee:

Your signature below indicates that you have discussed this event with the applicant, you have reviewed the applicant's security plan, and any necessary police details have been arranged for the Event.

Signature

Printed name/title

Date:

POLICE COMMENTS:

What types of alcoholic beverages do you plan to serve at the Event? (Note: By State Law, all-alcohol Special Licenses are available only to nonprofit organizations.) _____

Beer and Wine

What types of food and non-alcoholic beverages do you plan to serve at the Event? _____

**Chicken Roullade, Coriander Beef Tenderloin, Pecorino &
Butternut Squash Risotto, Seasonal Salad, Parmesan Crisps,
Dinner rolls, local artisan bread, Cheese platter, Water, Soda**

Who will be responsible for serving alcoholic beverages at the Event? _____

Christopher Geiger - Certified Bartender

What training or certification in responsible alcohol service does this person have? Please attach certificate or other proof of training for at least one person who will have responsibility for serving alcoholic beverages at each point of service and who will be present for the entire Event. _____

TiPS 360 training

Please list the names and dates of birth for all people who will be responsible for serving alcoholic beverages at the Event. Anyone serving alcoholic beverages must be at least 21 years of age. _____

Christopher Geiger _____

Name of the Massachusetts wholesaler who will deliver to site? (Full supplier list available on the ABCC website: www.mass.gov/abcc) _____

Kappy's

Date of Delivery: **Saturday, February 22, 2025**

Alcohol Serving Time (s): **5:30pm-10:00pm**

How, when, and by whom will excess alcoholic beverages obtained for the Event be disposed of? Unused beverages will be placed in the trunk of the client's car by the responsible manager. Unopened may

also be picked up by Kappy's.

Date of Pick-Up: Monday, February 24, 2025

Please provide details (insurance company, type of policy, name of insured, and policy limits) of any relevant insurance coverage for the Event, included but not limited to General Liability and Liquor Liability insurance. (You may be asked to supply a certificate or other proof of adequate insurance coverage.) _____

General and Liquor Liability

TIPS certificate

Security Plan

Please submit this completed form and filing fee to the Select Board at least 21 days before your Event. Failure to provide complete information may delay the processing of your application.

I HAVE READ AND UNDERSTAND ALL RULES AND REGULATIONS:

Signature: _____

Victoria Rose

Printed name: Victoria Rose/ Hanna Halperin-Goldstein

Printed title & Organization name: Wedding and Reception for Hanna and Sam

Email: vrose@arlington.k12.ma.us/ _____

Hanna Halperin-Goldstein



Wedding and Reception
Saturday, February 22, 2025
Whittemore Robbins House
Security Plan

A Wedding and Reception will be held at the Whittemore Robbins House on Saturday, February 22, 2025 from 4:30pm-10:30pm. Alcohol service will be from 5:30pm-10:00pm. A Special Alcohol License Application has been submitted to the Arlington Select Board.

This is the Security Plan.

We anticipate 43 guests. There will be no guests under the age of 21.

Victoria Rose, Event Coordinator, will be on site to monitor the use of the Whittemore Robbins House. Christopher Geiger from Simply Serving will be the Responsible Manager/Bartender for this event. Caterer Michael Betts will provide the attached menu and soda and water. The bartender will follow the rules of TIPS certification. The responsible manager/bartender and the event coordinator are all responsible for ensuring that the event runs smoothly.

Parking for the event will be in the Whittemore Robbins House and Robbins Library parking lots and on the side streets, as well as Massachusetts Avenue.

Please advise if there are other items to consider.

Thank you.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/03/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	Simply Business 1 Beacon Street 15th Floor Boston, MA 02108	CONTACT NAME:	Simply Business	
		PHONE (A/C, No, Ext):	(855) 771-0922	FAX (A/C, No):
		E-MAIL ADDRESS:	contactus@simplybusiness.com	
		INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED	Mike Betts Cook LLC 21 Linden Pl #2 Brookline, Massachusetts 02445	INSURER A:	Spinnaker Insurance Company	24376
		INSURER B:		
		INSURER C:		
		INSURER D:		
		INSURER E:		
		INSURER F:		

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X		HBW4774312XB1	12/04/2024	12/04/2025	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$100,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB EXCESS LIAB DED RETENTION						EACH OCCURRENCE AGGREGATE
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE Y/N OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below N/A						PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT
	PROFESSIONAL LIABILITY						EACH CLAIM AGGREGATE

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Menu for Wedding at Whittemore Robbins House on Saturday, February 22, 2025

1) CHICKEN ROULLADE

crispy potato-celery root galette, shaved Brussels sprouts, lemon, parsley,
pomegranate pan jus

2) CORIANDER BEEF TENDERLOIN

leek, asparagus, sweet pea ragou, celeriac salad, horseradish aioli

3) PECORINO & BUTTERNUT SQUASH RISOTTO

textures of squash, roots, various herbs, crispy garlic & shallots

SIDES: Seasonal salad, parmesan crisps, soft dinner rolls, local artisan bread, whipped
honey rosemary butter, artisanal olive oil, thyme & white bean spread



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/17/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Estabrook & Chamberlain Insurance 45 Main Street Bridgewater MA 02324		CONTACT NAME: Lisa Fonseca PHONE (A/C, No, Ext): (508) 697-6963 FAX (A/C, No): (508) 697-5809 E-MAIL ADDRESS: Lisa@candsins.com	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Central Mutual Insurance Company	
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	
INSURED BT&3 Hospitality LLC 637 E 1st St Unit 305 Unit 305 South Boston MA 02127-1737		NAIC # 20230	

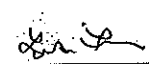
COVERAGES **CERTIFICATE NUMBER:** 2024 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	Y	CLP 8675846	12/01/2024	12/01/2025	EACH OCCURRENCE \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC					DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000
	OTHER:					MED EXP (Any one person) \$ 5,000
						PERSONAL & ADV INJURY \$ 1,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY		CLP 8675846	12/01/2024	12/01/2025	GENERAL AGGREGATE \$ 2,000,000
						PRODUCTS - COM/OP AGG \$ 2,000,000
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE					COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
						BODILY INJURY (Per person) \$
						BODILY INJURY (Per accident) \$
						PROPERTY DAMAGE (Per accident) \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N <input type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>
						E.L. EACH ACCIDENT \$
						E.L. DISEASE - EA EMPLOYEE \$
						E.L. DISEASE - POLICY LIMIT \$
A	Liquor Liability	Y	CLP 8675846	12/01/2024	12/01/2025	Each Common Cause \$1,000,000 Aggregate \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Whitmore Robbins House is included as additional insured in regards to General Liability as required by a signed written contract or agreement with the named insured.
Town of Arlington is included as additional insured in regards to Liquor Liability as required by a signed written contract or agreement with the named insured.

CERTIFICATE HOLDER Whitmore Robbins House 670 R Massachusetts Ave. Arlington MA 02476	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
---	---

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CERTIFICATE OF COMPLETION

This certifies that

Christopher Geiger

is awarded this certificate for

TIPS On-Premise Alcohol Server Training



Hours
3.00



Completion Date
11/12/2022



Expiration Date
11/11/2025



Certificate #
ON-000027165597

A handwritten signature in black ink, appearing to read "Scott McGehee", written over a horizontal line.

Official Signature

THIS CERTIFICATE IS NON-TRANSFERABLE



Town of Arlington, Massachusetts

Public Memorials Committee Approvals

Summary:

Alexander J. Salipante, Chair of Public Memorials Committee

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Public_Memorials_Approvals.pdf	Reference

C/O Arlington Board of Selectmen
730 Massachusetts Avenue
Arlington Massachusetts 02476-4908
Arlington Public Memorials Committee

February 7, 2025

Mr.
Stephen De Courcey
Chairman
Arlington Select Board
730 Massachusetts Avenue
Arlington, MA 02476-4908

Dear Mr. De Courcey

This is to inform you and the members of your Board that the Public Memorials Committee met on Thursday February 6, 2025 to review the two requests submitted by Paul Selker and Derek Brine.

After reviewing the two requests as follows The Public Memorials Committee voted unanimously to support both requests.

- 1) Selker Suggestion: A Town proclamation, A physical plaque near 231 Broadway or part of the history section of the Arlington town website describing Visi Calc and its legacy.
- 2) Brine Request: Dedicate the intersection of Churchill Avenue and Windermere Avenue in Honor of PFC Christopher Dareing Brine.

Therefore, please be advised that the requests submitted by Paul Selker and Derek Brine meet the criteria for being memorialized by the Town of Arlington.

If you require any further information or assistance I can be reached at (781) 643-4485.

Sincerely,

Alexander J. Salipante
Chairman



Town of Arlington, Massachusetts

Request: Special (One Day) Beer & Wine License, 4/5/2025 @ Lesley Ellis School for Private Event

Summary:

Jenn Champagne

ATTACHMENTS:

Type	File Name	Description
Reference Material	Lesley_Ellis_School_Champagne_J_040525_One_Day_License_Redacted.pdf	Reference

OFFICE OF THE SELECT BOARD
TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

SPECIAL ALCOHOL LICENSE APPLICATION

Name of Applicant: Lesley Ellis School - Event planning consultant - Jenn Champagne

Address, phone & e-mail contact information: [REDACTED]

C/O Spring Auction, [REDACTED], [REDACTED] cell: [REDACTED]

Name & address of Organization for which license is sought: Lesley Ellis School

34 Winter Street, Arlington, MA 02474

Does this Organization hold nonprofit status under the IRS Code? ☒ Yes ☐ No

Name of Responsible Manager of Organization (if different from above): _____

Manager - Deanne Benson, Head of School, event planning consultant - Jenn Champagne

Address, phone & e-mail contact information: 34 Winter Street, Arlington, MA 02474

C/O Spring Auction, [REDACTED]

Has the Applicant or Organization applied for and/or been granted a special liquor license this calendar year? No If so, please give date(s) of Special Licenses and/or applications and title of event(s). N/A

Is this event an annual or regular event? If so, when was the last time this event was held and at what location? Yes, this is an annual Spring Fundraiser, the last time the event

was held was April 6th, 2024, at Lesley Ellis School in the gymnasium

24-Hour contact number for Responsible Manager of Alcohol Event date: [REDACTED]

Manager Cell: [REDACTED], Event Planner Cell: [REDACTED]

Title of Event: 2025 LES Spring Auction & Gala Fundraiser for Tuition Assistance

Date/time of Event: Saturday, April 5, 2025 at 6-10pm

Location of Event: Lesley Ellis School in the gymnasium

Location/Event Coordinator: Jenn Champagne - [REDACTED]

Method(s) of Invitation/publicity for Event: Emails to LES families, school social media

Number of people expected to attend: 110-140 attendees

Expected admission/ticket prices: \$50

Expected prices for food and beverages (alcoholic and non-alcoholic): Food and non-alcohol beverages will be free, alcoholic beverages may be included in price of admissions ticket, or \$10 per beverage. If a fee is preferred by the Town, we can charge a fee.

Will persons under age 21 be on premises? No, this event is open to only over 21.

If "yes," please detail plan to prevent access of minors to alcoholic beverages. N/A

Have you consulted with the Department of Police Services about your security plan for the Event? _____

*Safety plan attached to application.

OFFICE USE ONLY

For Police Chief, Operations Commander, or designee:

Your signature below indicates that you have discussed this event with the applicant, you have reviewed the applicant's security plan, and any necessary police details have been arranged for the Event.

Det. Corey J. Koteau
Printed name/title

Date: 1/21/25

POLICE COMMENTS:

The decision to issue drink ticket, charge per drink, or a combination of both lies with the applicant.

What types of alcoholic beverages do you plan to serve at the Event? (Note: By State Law, all-alcohol Special Licenses are available only to nonprofit organizations.) _____

Malt and wine.

What types of food and non-alcoholic beverages do you plan to serve at the Event? _____

Hors d'oeuvres, a full main course (likely Italian food including pasta and chicken options as well as vegetarian), desserts, water, seltzer, coffee, juice, and/or soda.

Who will be responsible for serving alcoholic beverages at the Event? Jack's Abby Craft Brewery, has offered to provide the Malt as well as a bartender.

What training or certification in responsible alcohol service does this person have? Please attach certificate or other proof of training for at least one person who will have responsibility for serving alcoholic beverages at each point of service and who will be present for the entire Event. _____

Matthew Ozellus of Jack's Abby will serve, and if for any reason unable to attend, another TipS or ServeSafe certified server will attend and serve. Certification attached.

Please list the names and dates of birth for all people who will be responsible for serving alcoholic beverages at the Event. Anyone serving alcoholic beverages must be at least 21 years of age. _____

Matthew Ozellus of Jack's Abby will serve - date of birth: [REDACTED]

If for any reason unable to attend, another TIPS or ServeSafe certified adult over the age of 21 will serve.

Name of the Massachusetts wholesaler who will deliver to site? (Full supplier list available on the ABCC website: www.mass.gov/abcc) Jack's Abby Craft Brewery for Malt. Wine to be purchased.

*Also seeking permission to accept donated alcohol, pursuant to Section 14 of chapter 138 of the General Laws. Please see attached email from MA Alcoholic Beverages Control Commission Licensing Supervisor, Sean Walsh.

Date of Delivery: Saturday, April 5, 2025

Alcohol Serving Time (s): Saturday April 5, 2025 at 6-9:30p.m.

How, when, and by whom will excess alcoholic beverages obtained for the Event be disposed of? A representative of Jack's Abby will take any excess malt beverages. Excess wine will be removed from the premises by an administrator, or individual listed on the attached safety plan and returned to the approved store purchased from.

Date of Pick-Up: Saturday, April 5, 2025.

Please provide details (insurance company, type of policy, name of insured, and policy limits) of any relevant insurance coverage for the Event, included but not limited to General Liability and Liquor Liability Insurance. (You may be asked to supply a certificate or other proof of adequate insurance coverage.) See attached.

Please submit this completed form and filing fee to the Select Board at least 21 days before your Event. Failure to provide complete information may delay the processing of your application.

I HAVE READ AND UNDERSTAND ALL RULES AND REGULATIONS:

Signature: 

Printed name: Jenn Champagne

Printed title & Organization name: Event Coordinator Consultant & Parent Chair of Spring Auction Committee - Lesley Ellis School

Email: 



Lesley Ellis School

The Journey is as important as the destination

Lesley Ellis School Security Plan for Special Alcohol License Application

Lesley Ellis School holds our spring fundraising event annually. This year, the 2025 LES Spring Auction & Gala Fundraiser will be held on April 5, 2025.

This event is an internal LES community ticketed event open to parents, grandparents, teachers, and staff for the purpose of raising a goal of \$100,000 for Tuition Assistance. The Lesley Ellis staff and parent community discourages overindulgence of alcohol while encouraging an environment where people watch out for one another.

Plan for the evening:

- Deanne Benson, Emily Roos, Andy Stratford, and Jenn Champagne will keep a general eye on the crowd, and will be the go-to people if any concerns arise. As administrators, and event planner/LES parent, these individuals will know everyone in attendance.
- The event is only open to guests over 21 years of age (110-140 attendees are expected).
- Double doors to the school building at 34 Winter Street will remain unlocked and accessible through the entire event.
- Event staff are informed of all exits and exit signage is clearly marked and visible.
- Food including hors d'oeuvres, a full main course dinner, and dessert will be served.
- Non-alcoholic beverages including water and a coffee station will be provided.
- The parking lot adjacent to the school provides the majority of the parking. On street parking in legally designated areas will also be utilized.
- Crowd control issues are not anticipated as this is a ticketed event, not open to the public, and event staff will be monitoring the entrance to allow only ticketed guests.
- No alcohol will be served to any person appearing intoxicated.
- In the unlikely event of an unruly guest, administrators will speak to the guest, identify a companion or friend and escort said guest out of the event area. Once outside the event area, if a responsible person cannot be located to assist the guest in leaving the event, an administrator will call 911 to request police assistance.
- Emily Roos is a trained CPR instructor and the majority of LES staff who will be in attendance are trained in CPR.
- The bar will close 30 minutes prior to the 10 p.m. ending of the event.
- Jack's Abby Craft Brewery will be providing the Malt beverages and a TiPS Certified Bartender to serve any and all alcohol served on site.

The following administrators will be present and working at the event:

- Deanne Benson, Head of School
- Emily Roos, Director of Auxiliary Programs
- Andy Straford, Director of Middle School Admissions, Arts Director
- Jenn Champagne, Event planning consultant & Spring Auction Committee Chair

Note Re Crisis and Evacuation Plan: Lesley Ellis School has an extensive crisis plan developed in conjunction with Arlington town emergency officials as well as security cameras.

For additional information, please do not hesitate contact the event coordinator and parent Chair of the Spring Auction & Gala Committee, Jenn Champagne at [REDACTED]



CERTIFICATE OF COMPLETION

This certifies that

Matthew Ozelius

is awarded this certificate for

TIPS On-Premise Alcohol Server Training



Hours
3.00



Completion Date
03/22/2023



Expiration Date
03/21/2026



Certificate #
ON-000028403920

Official Signature

THIS CERTIFICATE IS NON-TRANSFERABLE

5000 Plaza on the Lake, Suite 305 | Austin, TX 78746 | 877.881.2235 | www.360training.com

(CUT HERE)

(CUT HERE)

TIPS On-Premise
Issued: 03/22/2023
Certificate #: ON-000028403920

Matthew Ozelius

CERTIFIED

Expires: 03/21/2026



Phone: 800-438-8477
www.gettips.com

This card was issued for successful completion of the TIPS program.

Signature _____



SCH00-1

OP ID: AC

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

07/01/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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PRODUCER
S. B. Goddard & Son Co.
7 Winn Street
Woburn, MA 01801-2028
Richard Mahoney

781-933-0076

CONTACT NAME: Ann Marie Chaulk

PHONE (A/C, No, Ext): 781-933-0076

FAX (A/C, No): 781-932-0364

E-MAIL ADDRESS: annmarie@goddardinsurance.com

INSURER(S) AFFORDING COVERAGE

NAIC #

INSURER A: Philadelphia Insurance Co.

INSURER B: Pilgrim Ins Company

INSURER C: Wesco Insurance Co.

INSURER D:

INSURER E:

INSURER F:

INSURED
Schools For Children, Inc.
8 Winchester Place Suite 202
Winchester, MA 01890

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD INVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		PHPK2571026-021	07/01/2024	07/01/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:					
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		CSC00001003123	07/01/2024	07/01/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE		PHUB870131-021	07/01/2024	07/01/2025	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
	DED <input checked="" type="checkbox"/> RETENTIONS \$ 10000					
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR-PARTNER-EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N / A	WWC3726207	07/01/2024	07/01/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Sexual/Physical Abuse/Molestation		PHPK2571026-021	07/01/2024	07/01/2025	Aggregate \$ 2,000,000 Ea Occ \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

Schools for Children, Inc.
Attn: Beverly Beno
8 Winchester Place Suite 202
Winchester, MA 01890

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



Schools
for
Children

Jenn Champagne <jchampagne@lesleyellis.org>

Follow up regarding One Day Permit vs. Charity Pouring Question

Walsh, Sean (TRE) <smwalsh@tre.state.ma.us>

Mon, Jan 6, 2025 at 2:37 PM

To: Jenn Champagne [REDACTED]

Hi Jenn,

Thanks for reaching out. Basically, what you are describing is pulled directly from MGL 138 Section 14, which allows for certified non-profits to receive donated alcohol and serve all alcohol, including wine and malt, at a one-day licensed event. This statute can be found for reference here: <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXX/Chapter138/Section14>. This license does not account for off premises consumption or auctions, but it does allow for on-premises consumption like you described. This would be issued by the licensing board in your town.

Thanks,

Sean Walsh

Licensing Supervisor

Massachusetts Alcoholic Beverages Control Commission

95 Fourth Street, Suite 3

Chelsea, MA 02150

Phone- 617-727-3040 ext. 749

Fax-1-617-727-1258

smwalsh@tre.state.ma.us

From: Jenn Champagne [REDACTED]

Sent: Monday, January 6, 2025 2:32 PM

To: Walsh, Sean (TRE) <smwalsh@tre.state.ma.us>

Subject: Follow up regarding One Day Permit vs. Charity Pouring Question

CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail system. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Dear Supervisor Walsh,

1/17/25, 4:38 PM

Schools for Children Mail - Follow up regarding One Day Permit vs. Charity Pouring Question

It was a pleasure speaking with you this morning. Thank you for providing clarification regarding the One-Day Special Permit versus the Charity Wine Fundraising Licenses.

I'm chair of the planning committee at Lesley Ellis School (a non-profit organization and member of Schools for Children) for this year's annual Spring Fundraiser on April 5th. The event will be an Auction Gala (adults over 21 years only), held at Lesley Ellis School which is not licensed to sell alcohol. There will be an auction with items such as a stay at a vacation house, a cooking party with a teacher from school, etc. NO alcohol will be auctioned.

Lesley Ellis will be applying for a Special One Day Liquor License through the Town of Arlington to request permission to serve alcohol at the event.

It would be helpful to have written clarification on this issue to offer for the Town Select Board's consideration.

- Clarification that a Non-profit organization organized pursuant to Chapter 180 is able to accept donated alcohol from a person licensed to manufacture or sell alcoholic beverages (including malt and wine) provided that the alcohol will not be auctioned.
- Further clarification that a Charity Wine Fundraising License is NOT required by the Alcoholic Beverages Control Commission in this situation and that a One Day License through the local authority is sufficient to meet the ABCC's guidelines would be helpful.

Thank you very much for your kind assistance. If you require any additional information, please do not hesitate to contact me.

Jenn Champagne

[REDACTED]

--

Regards,

Jenn Champagne (she/her/hers)

2025 LES Spring Auction Committee Chair

Lesley Ellis School, Pre-school - Grade 8

34 Winter Street

Arlington, MA 02474

[REDACTED]

www.lesleyellis.org

Part I	ADMINISTRATION OF THE GOVERNMENT
Title XX	PUBLIC SAFETY AND GOOD ORDER
Chapter 138	ALCOHOLIC LIQUORS
Section 14	SPECIAL LICENSES TO MANAGERS OF INDOOR OR OUTDOOR ACTIVITIES; FEES

Section 14. In a city or town wherein the granting of licenses to sell all alcoholic beverages or wines and malt beverages only is authorized under this chapter, special licenses for the sale of wines and malt beverages only, or either of them, may be issued by the local licensing authorities, to the responsible manager of any indoor or outdoor activity or enterprise; provided, however, in any city or town wherein the granting of licenses to sell all alcoholic beverages is authorized under this chapter, special licenses for the sale of all alcoholic beverages or wine and malt beverages only, or any of them, may be issued by the local licensing authorities to the responsible manager of any nonprofit organization conducting any indoor or outdoor activity or enterprise. Special licenses for the dispensing of wines and malt beverages in dining halls maintained by incorporated educational institutions authorized to grant degrees may be granted by the local licensing authorities in such a city or town to such institutions; provided, that such beverages shall be served only to persons

over twenty-one years of age. The fees for licenses granted under this section shall be fixed from time to time by the local licensing authorities and need not be uniform.

A nonprofit charitable corporation organized pursuant to chapter 180 and registered with the division of public charities in the department of the attorney general and licensed pursuant to this section may accept free alcoholic beverages donated to the nonprofit charitable corporation by an individual, by a person licensed to manufacture alcoholic beverages or by a person licensed to sell alcoholic beverages at wholesale or retail pursuant to this chapter for the purpose of serving such donated alcoholic beverages at fundraising events for the benefit of the nonprofit charitable corporation.

A license under this section shall not be granted to any person while his application for a license under section twelve is pending before the licensing authorities.



William Francis Galvin
Secretary of the
Commonwealth

The Commonwealth of Massachusetts
Secretary of the Commonwealth
State House, Boston, Massachusetts 02133

Date: January 13, 2025

To Whom It May Concern :

I hereby certify that according to the records of this office,
SCHOOLS FOR CHILDREN, INC.

is a domestic corporation organized on **February 27, 1981**

I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 180 section 26 A, for revocation of the charter of said corporation; that the State Secretary has not received notice of dissolution of the corporation pursuant to Massachusetts General Laws, Chapter 180, Section 11, 11A, or 11B; that said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.



In testimony of which,
I have hereunto affixed the
Great Seal of the Commonwealth
on the date first above written.

William Francis Galvin

Secretary of the Commonwealth

Certificate Number: 25010248990

Verify this Certificate at: <http://corp.sec.state.ma.us/CorpWeb/Certificates/Verify.aspx>

Processed by: qle



THE COMMONWEALTH OF MASSACHUSETTS
OFFICE OF THE ATTORNEY GENERAL

ANDREA JOY CAMPBELL
ATTORNEY GENERAL

ONE ASHBURTON PLACE
BOSTON, MASSACHUSETTS 02108

(617) 727-2200
www.mass.gov/ago

Certificate of Solicitation

This certificate has been issued to the organization listed below because it is current in its filings with the Non-Profit Organizations/Public Charities Division of the Massachusetts Attorney General's Office. This registration in no manner constitutes endorsement or approval by the Commonwealth of Massachusetts of the named organization.

- Name of the Organization: SCHOOLS FOR CHILDREN, INC.
- Certificate End Date: 5/15/2025
- AGO Charity Number: 012507
- Charity Address: 8 Winchester Pl., Suite
202, Winchester, Massachusetts, 01890

<https://www.mass.gov/service-details/overview-of-solicitation>



Town of Arlington, Massachusetts

Acceptance of Funds From Various Entities

Summary:

Christine Bongiorno, Deputy Town Manager or Operations

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	FOTR_Approval_of_Funds_02032025.pdf	Reference



Town of Arlington
Office of the Town Manager

730 Massachusetts Avenue
Arlington, MA 02476

Tel: (781) 316-3002

MEMO

TO: Select Board

FROM: Christine Bongiorno, Deputy Town Manager-Operations

DATE: February 4, 2025

RE: Funds received, approval requested

The Town Manager's Office received a \$13,133.62 contribution from the Arlington Chamber of Commerce for the Foot of the Rocks project. These funds will be used to assist with costs associated with the construction of this project.

Amount	Received	Use	Source	Department
\$ 13,133.62	January 30, 2025	Foot of the Rocks Project	Arlington Chamber of Commerce	Town Manager's Office



Town of Arlington, Massachusetts

Request: Contractor/Drainlayer License

Summary:

C.F. Russell Excavating LLC

Cole Russell

Wilmington, MA 01887

ATTACHMENTS:

Type	File Name	Description
Reference Material	CF_Russell_Excavating_Contractor_Drainlayer_Redacted.pdf	Reference

OFFICE OF THE SELECT BOARD

STEPHEN W. DECOURCEY, CHAIR
DIANE M. MAHON, VICE CHAIR
JOHN V. HURD
LENARD T. DIGGINS
ERIC D. HELMUTH



730 MASSACHUSETTS AVENUE
TELEPHONE 781-316-3020
FAX 781-316-3029

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 4, 2025

C.F. Russell Excavating LLC
Cole Russell

Wilmington, MA 01887

Dear Cole:

The Select Board will be discussing your request for a License to do Drainlaying in the Town of Arlington by hybrid format on Wednesday, February 12, 2025 at 7:15 p.m. Although it is not a requirement that you attend this meeting, you are invited to do so.

The meeting will take place in the Select Board Chambers. The link to the meeting and other information will be available at the bottom of the Select Board Agenda as well as on the Town Calendar when the meeting is posted Monday, February 10th by 4:00 p.m.

Please contact this office by email, ckalogeropoulos@town.arlington.ma.us, if you have any questions.

Very truly yours,
SELECT BOARD

A handwritten signature in black ink, appearing to read "Caroline Kalogeropoulos".

Caroline Kalogeropoulos
Administrative Assistant



Engineering Division

TOWN OF ARLINGTON
Department of Public Works
51 Grove Street
Arlington, Massachusetts 02476
Office (781) 316-3320 Fax (781) 316-3281

MEMORANDUM

To: Select Board
From: Engineering Division
Re: Approved Contractor License
Date: February 3, 2025

Dear Board Members,

Reference is hereby made to an application by Cole Russell of C.F. Russell Excavating LLC, to be accepted as an Approved Contractor in the Town of Arlington.

Contact information is as follows:

C.F. Russell Excavating LLC
Cole Russell

[REDACTED]

Wilmington, MA 01887

Phone: [REDACTED]

Email: [REDACTED]

Upon review of the application supplied by the contractor, we recommend approval and issuance of an Approved Contractor license.

Regards,

Wolfgang G. Kirstein, E.I.T.
Civil Engineer

CC: William C. Copithorne, P.E., Town Engineer
File



TOWN OF ARLINGTON DEPARTMENT OF PUBLIC WORKS

APPLICATION FOR TOWN OF ARLINGTON DPW CONTRACTOR LICENSE

Directions: Please complete ALL fields below and deliver the completed application to the Department of Public Works Engineering Department at 51 Grove Street for Processing and Submission to the Select Board. Please also include in your submission a \$75.00 application fee in the form of a check payable to the "Town of Arlington". Any questions regarding this application form or procedure should be directed to the Town of Arlington Engineering Department at 781-316-3320.

Scope of Work

Please indicate the scope of work you intend to perform as a DPW Approved Contractor in the Town of Arlington (check all that apply):

☒ Water ☒ Sanitary Sewer ☒ Stormwater Drainage ☐ Sewer/Drain Inspection ☒ Driveway Work ☒ Curb/Sidewalk Work

Applicant Information

Applicant/Firm Name: C. F. Russell Excavating LLC

Select One: ☐ Corporation ☐ Partnership ☐ Proprietorship ☐ Other: LLC

Street Address: [REDACTED] City/Town: Wilmington State: MA Zip Code: 01887

Primary Phone: [REDACTED] E-mail: [REDACTED]

Length of Time in Business under the same Firm Name: 3 years

Full Name(s) of Principal(s): Cole Russell

Primary Contact Person: Cole Russell

Experience/Previous Work

Nature of Typical/Standard Work: Water/Sewer/Drainage/Site Development

Have you ever performed this type of work in Arlington: ☒ Yes ☐ No

If Yes, Please provide Location: All over the town with previous employer A.P. Flowers & Son Approximate Date: Beginning in 2019

Total Amount of such construction this year: \$32,000 to date

Total Amount of such construction last year: \$187,000

Total Amount of such construction next previous year: \$143,000

Municipal References - Please Attach Written Reference Letters or Provide Contact Information

Municipality: City of Gloucester (letter attached)

Primary Contact Name: Michael Hale Email: mhale@gloucester-ma.gov

Municipality: Town of Burlington (letter attached)

Primary Contact Name: Brian White Email: dpw@burlington.org

Municipality: Town of Tewksbury (they do not provide letters, they request a call if needed)

Primary Contact Name: Kevin Hardiman Email: khardiman@tewksbury-ma.gov

Banking/Financial References - Please Attach Written Reference Letters if Available

Bank Reference: _____ Phone: _____

Federal Tax ID or Social Security #: [REDACTED]

Note to Town Staff: Redact Social Security # before releasing document

Your social security number or federal identification number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licenses who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Massachusetts General Law, Chapter 62C, Section 49A.

Signature/Endorsement

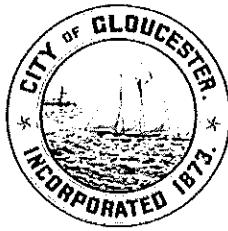
By signing below, I certify that under the penalties of perjury that to the best of my knowledge and belief all information on this application is true and correct. I also certify by signature below that I/ve have filed all state tax returns and paid all state taxes as required by law. I also hereby agree to conform in all respects to the conditions governing such license as printed in the By-Laws of the Town, and such other rules and regulations as the Select Board and/or Department of Public Works may establish.

Applicant Signature: Cole Russell Date: 1/30/25

Reset Form

Print Form

Department of Public Works
28 Poplar Street
Gloucester, MA 01930



TEL (978)281-9785
FAX(978)281-3896
mhale@gloucester-ma.gov

CITY OF GLOUCESTER
DEPARTMENT OF PUBLIC WORKS

November 13, 2024

RE: Letter of Recommendation – C.F. Russell Excavating

To whom it may concern:

The City of Gloucester has worked with C. F. Russell Excavating and would recommend them for future work.

They work in an efficient and professional manner to meet their contract requirements for projects such as the new Vietnam Memorial on Hough Ave in Gloucester.

If you have any questions please feel free to call me at 978-281-9785.

Regards,

Michael B. Hale
Director of Public Works



TOWN OF BURLINGTON

Department of Public Works

January 29, 2025

Town of Arlington
Department of Public Works
51 Grove St
Arlington, MA 02476

RE: Utility Contractor Reference

To whom it may concern,

C.F. Russell Excavating, LLC is licensed with the Town of Burlington to perform water/sewer utility connections in the Town of Burlington. DPW has not had any problems with the company nor its employees. If you have any further questions, please contact our Engineering Division at 781-270-1640.

Regards,

Brian White,
Director of Public Works





Town of Arlington, Massachusetts

Acceptance of Certain Capital Contributions/33 Ryder Street

Summary:

James Feeney, Town Manager

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Memo_to_Select_Board_33_Ryder_A+E.pdf	Reference



**Town of Arlington
Office of the Town Manager**

**James Feeney
Town Manager**

**730 Massachusetts Avenue
Arlington, MA 02476-4908
Phone (781) 316-3010
Website: www.arlingtonma.gov**

MEMORANDUM

To: Members of the Select Board

Cc: Michael C. Cunningham, Town Counsel
Jaclyn Munson, Deputy Town Counsel

From: James Feeney, Town Manager

Date: February 6, 2025

RE: Acceptance of certain capital contributions/33 Ryder Street

Purpose:

The purpose of this memorandum is to provide an overview of, and request the Select Board to, accept certain capital contributions to be provided by Watermill Place Condominium via Briggs LLC ("Briggs") for the benefit of the Town, in perpetuity, to be used for the purposes provided.

Background:

The 130-unit Watermill Place Condominium will soon be undertaking a construction project to repair water damage in their garage that is threatening the structural integrity of the building. During the duration of this project, a significant amount of on-site resident parking will be displaced. After attempts to secure parking at 18 nearby locations over the course of a year proved unsuccessful, Briggs sought assistance from the Town.

The Town intends to enter into a license agreement (the "Agreement") commencing in March 2025 to permit Briggs to use certain Town-owned property located at 33 Ryder Street (the "Parcel"). Briggs seeks to use a portion of the Parcel for parking purposes and in turn, has agreed to compensate the Town for said license for a sum of Five Thousand Dollars (\$5,000.00) per month

for the term of the Agreement. The term of the Agreement is expected to be at least six months. As part of the Agreement, the Town will retain necessary access to the Parcel and retain all other property rights over the same.

It is noted the use of the property at 33 Ryder St. will not meet the full need, so the Select Board should also expect a future request from Brigs seeking on-street parking relief related to this project.

Capital Contributions:

Brigs, at its own cost and expense, has offered to provide the following capital contributions on the Parcel for the benefit of their own short-term use and the Town:

1. Install a powered swinging gate at the entrance to the Parcel; and
2. Disconnect power, demolish, and dispose of an existing garage structure at the rear of the Parcel; and
3. Install additional lighting at the Parcel; and
4. Perform basic parking surface maintenance.

Legal Requirement:

In accordance with to M.G.L. ch. 44 s. 53A, the Select Board's acceptance of the capital contribution to be used for the purposes provided by Brigs is required. This is because the capital contributions are items or goods of value being provided without charge to the Town by Brigs. The value of the capital contribution is approximately \$39,725.

Conclusion:

The Select Board's acceptance of the capital contributions will result in a cost savings for the Town while simultaneously providing necessary upgrades and infrastructure that will benefit the Town and its constituents. Thank you for your time and consideration.



Town of Arlington, Massachusetts

2025 Farmers' Market

Summary:

Johanna Niles, Market Manager

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Farmers_Market_Letter.pdf	Reference



RECEIVED BY THE
SELECT BOARD OFFICE
ARLINGTON, MA 02476
2025 FEB -6 PM 4:42

3 February 2025

MEMORANDUM TO THE ARLINGTON SELECT BOARD

2025 FARMERS' MARKET

Arlington EATS respectfully requests permission to hold the twenty-eighth Arlington Farmers' Market at the Russell Common Parking Lot, Arlington Center, for the 2025 season. The market is held on Wednesdays 2:00 pm to 6:30 pm. The 2025 market will begin on Wednesday, June 4 and close on Wednesday, October 29.

The Market will continue as a program of Arlington EATS and will be managed by Johanna Niles and Patsy Kraemer.

The market holds liability insurance that is provided from the Massachusetts Farmers' Market Association.

We hope you will approve the continuation of this program at the Russell Common Parking Lot.

Johanna Niles
Community Food Access Manager
Arlington EATS
jniles@arlingtonseats.org
339-707-6757 ext. 1006



Town of Arlington, Massachusetts

Vote: Authorizing In Person Early Voting for Annual Town Election and Police Details for the Annual Town Election, April 5, 2025

Summary:

Julie Brazile, Town Clerk

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Authorization_for_Police_Details.pdf	Reference

Town of Arlington
Office of the Town Clerk
730 Massachusetts Avenue
Arlington, MA 02476



Tel: 781-316-3070
townclerk@town.arlington.ma.us

MEMO

TO: Select Board
FROM: Juli Brazile, Town Clerk
DATE: February 7, 2025
RE: Authorization for police details and early voting

Election Law requires a Select Board vote to authorize the necessary police details for each election and to authorize in-person early voting for a local election. This memo provides the background and language for the votes needed for the Annual Town Election on April 5, 2025.

Police Details

Officers are required at each polling location under G.L. Chapter 54, Section 72 on election day. Officers are optional during early in-person voting; however it has been Arlington's practice to have an officer detailed to Town Hall during early voting. The law now applies the 150-foot rule regarding election signs during early voting hours as well, making the need for an officer stationed outside the front entrance of Town Hall important. I ask the Board to take the following votes:

Voted: that the Town Manager and Police Chief are directed to assign sufficient police details to preserve order and protect election officers as required by G.L. c. 54 sec. 72:

Town Hall for early voting Saturday March 29, 10:00 AM – 2:00 PM
Town Hall for early voting Monday March 31, 8:00 AM – 4:00 PM
Town Hall for early voting Tuesday April 1, 8:00 AM – 7:00 PM
Town Hall for early voting Wednesday April 2, 8:00 AM – 4:00 PM

At the nine (9) polling locations on April 5, 2025 between the hours of 8:00 AM and 8:00 PM

Thompson School	Hardy School
Gibbs School	Town Hall
Bishop School	Brackett School
Stratton School	Dallin School
Peirce School	

Early In-Person Voting for Annual Town Election

G.L. Chapter 54, Section 25B (c) (1) allows the Select Board to authorize early in-person voting for a town election after a request from not less than 50 percent of the registrars of the town. The Board of Registrars met on January 23, 2025 and unanimously voted to recommend in person early voting for the April 5 Town Election. I am forwarding this recommendation and ask you to approve the schedule of dates and times below. The presumption in the law is that early in-person voting occurs during the regular business hours of the Town Clerk unless additional hours or weekend hours are approved.

Voted: that early in-person voting be conducted at the Office of the Town Clerk on the 2nd Floor of Town Hall at the following dates and times:

Saturday March 29, 10:00 AM – 2:00 PM

Monday March 31, 8:00 AM – 4:00 PM

Tuesday April 1, 8:00 AM – 7:00 PM

Wednesday April 2, 8:00 AM – 4:00 PM



Town of Arlington, Massachusetts

Elderly and Disabled Tax Relief Committee

Summary:

Melissa McInerney (Term to Expire: 12/31/2027)

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	McInerney_Elderly_Tax_apptmt_ltr.pdf	Reference

OFFICE OF THE SELECT BOARD

STEPHEN W. DECOURCEY, CHAIR
DIANE M. MAHON, VICE CHAIR
JOHN V. HURD
LENARD T. DIGGINS
ERIC D. HELMUTH



730 MASSACHUSETTS AVENUE
TELEPHONE
781-316-3020
781-316-3029 FAX

TOWN OF ARLINGTON
MASSACHUSETTS 02476-4908

February 3, 2025

Melissa Powell McInerney
Arlington, MA 02476

Re: Appointment: Elderly and Disabled Tax Relief Committee

Dear Melissa:

As a matter of the standard appointment procedure, the Select Board requests that you attend the Select Board meeting conducted by hybrid format, on Wednesday, February 12, 2025 at 7:15 p.m.

It is a requirement of the Select Board that you join this hybrid meeting. This will give the Board an opportunity to meet and discuss matters with you about the area of activity in which you will be involved.

You may attend the meeting in-person or virtually. The meeting will take place in the Select Board Chambers. The link to the meeting and other information will be available at the bottom of the Select Board Agenda as well as on the Town Calendar when the meeting is posted on Monday, February 10th, at 4:00 p.m.

Please do not hesitate to contact me by e-mail, sbadmin@town.arlington.ma.us, if you have any questions.

Thank you.

Very truly yours,
SELECT BOARD

A handwritten signature in cursive script that reads "Ashley Maher".

Ashley Maher
Board Administrator

Melissa Powell McInerney

Department of Economics
Tufts University
177 College Avenue
Medford, MA 02155

E-mail: [REDACTED]
Office: Cummings 540E
Tel: [REDACTED]
Website: <https://sites.google.com/view/melissapmcinerney/home>

ACADEMIC POSITIONS

Professor, Tufts University <i>Department of Economics</i> <i>Department of Community Health</i> <i>Tufts Clinical and Translational Science Institute</i>	2021-
Associate Professor (with tenure), Tufts University <i>Department of Economics</i> <i>Tufts Clinical and Translational Science Institute (2017-)</i>	2014-2021
Visiting Scholar, Boston College Center for Retirement Research	2016-2017
Assistant Professor, College of William and Mary <i>Department of Economics</i> <i>Thomas Jefferson Program in Public Policy</i>	2008-2014

PROFESSIONAL APPOINTMENTS

Research Associate, National Bureau of Economic Research	2020-
--	-------

EDUCATION

Ph.D. Economics, University of Maryland at College Park, 2008
M.P.P. Education, Social, and Family Policy, Georgetown Public Policy Institute, 2002
B.A. Mathematics, Carleton College, Northfield, MN, 1998

FIELDS OF SPECIALIZATION

Public Economics, Health Economics, Labor Economics, Applied Microeconomics

REFEREED JOURNAL ARTICLES

Mellor, JM, M McInerney, RC Garrow, and LM Sabik. 2023. "The Impact of Medicaid Expansion on Medicare Spending and Utilization by Older Low-Income Adults." *Health Services Research*.
<https://doi.org/10.1111/1475-6773.14155>

McInerney, M, JM Mellor, LM Sabik, and V Ramamoorthy (GSAS '23). 2022. "Improving Identification of Community-Dwelling Older Adults Eligible for Medicaid in Major Household Surveys." *Health Services and Outcomes Research Methodology*. doi: 10.1007/s10742-022-00297-5

McInerney, M, G McCormack, JM Mellor, LM Sabik. 2022. "Association of ACA Medicaid Expansion with Medicaid Receipt and Health Care Use in Low-Income Older Adults with Chronic Condition Limitations." *JAMA Health Forum*, 3(6):e221373. Doi:/10.1001/jamahealthforum.2022.1373.

Roberts, E, JM Mellor, M McInerney, and LM Sabik. 2022. "Effects of a Medicaid Dental Coverage 'Cliff' on Dental Access Among Low-Income Medicare Beneficiaries." *Health Services Research*. <http://doi.org/10.1111/1475-6773.13981>

Garrow, R, M McInerney, JM Mellor, and LM Sabik. 2022. "Examining Medicaid Participation and Medicaid Entry among Senior Medicare Beneficiaries with Linked Administrative and Survey Data." *Medical Care Research and Review*. DOI: [10.1177/10775587221101297](https://doi.org/10.1177/10775587221101297)

Cornelio, N, M McInerney, JM Mellor, ET Roberts, and LM Sabik. 2021. "Increasing Medicaid Asset Tests for People Eligible for Medicare and Medicaid Will Help Vulnerable Seniors." *Health Affairs*, 40(12): 1943-1952.

McInerney M, J Mellor, and L Sabik. 2021. "Welcome Mats and On-Ramps for Older Adults: The Impact of the Affordable Care Act's Medicaid Expansions on Dual Enrollment in Medicare and Medicaid." *Journal of Policy Analysis and Management*, 40(1): 12-41.

Bronchetti, ET and M McInerney. 2021. "Health Care Reform and Workers' Compensation: Evidence from Massachusetts." *Industrial Labor Relations and Review*. 4(2): 388-418. <https://doi.org/10.1177/0019793919891425>

Mellor, JM, M McInerney, and LM Sabik. 2021. "Misclassification of Medicaid Participation by Dual Eligibles: Evidence from the Medicare Current Beneficiary Survey." *Medical Care Research and Review*, 78(2): 113-124. <https://doi.org/10.1177/1077558719858839>

McInerney, M, R Winecoff, P Ayyagari, and MK Bundorf. 2020. "New Evidence on the Effects of the ACA Medicaid Expansion on Near-Elderly Coverage, Out-of-Pocket Spending, and Health Status: Insights from the Health and Retirement Study." *INQUIRY: The Journal of Health Care Organization, Provision, and Financing*. 57:1-10.

McInerney, M and M Meiselbach (A '15). 2020. "Distributional Effects of Recent Health Insurance Expansions on Weight-Related Outcomes." *Economics and Human Biology*. 38(2020): 100870.

Dillender, M and M McInerney. 2020. "The Role of Mexican Immigration to the United States in Improved Workplace Safety for Natives from 1980 to 2015." *Journal of Health Economics* 70(2020): 102280.

Roberts, ET, JM Mellor, M McInerney, and LM Sabik. 2019. "State Variation in the Characteristics of Medicare-Medicaid Dual Enrollees: Implications for Risk Adjustment." *Health Services Research* 54: 1233-1245.

- McInerney, M, JM Mellor, and LM Sabik. 2017. “The Effects of State Medicaid Expansions for Working-Age Adults on Senior Medicare Beneficiaries.” *American Economic Journal: Economic Policy* 9(3): 408-38.
- McHenry, PN and M McInerney. 2015. “Estimating Hispanic-White Wage Gaps Among Women: The Importance of Controlling for Cost of Living.” *Journal of Labor Research* 36: 249-273.
- Bronchetti, ET and M McInerney. 2015. “What Determines Employer Accommodation of Injured Workers? The Importance of Employer Workers’ Compensation Costs, State Policies, and Case-Specific Characteristics.” *Industrial and Labor Relations Review* 68(3): 558-583.
- He, D, M McInerney, and JM Mellor. 2015. “Physician Responses to Rising Local Unemployment Rates: Hospital Care Provision to Medicare and Privately-Insured Patients.” *Journal of Health Economics* 40: 97-108.
- McHenry, PN and M McInerney. 2014. “The Importance of Cost of Living and Education in Estimates of the Conditional Wage Gap Between “Black and White Women.” *Journal of Human Resources* 49(3): 695-722.
- McInerney, M, JM Mellor, and LH Nicholas. 2013. “Recession Depression: Mental Health Effects of the 2008 Stock Market Crash.” *Journal of Health Economics* 32(6): 1090-1104.
- McInerney, M and JM Mellor. 2012. “State Unemployment During Recessions from 1991-2009 Was Linked to Faster Growth in Medicare Spending.” *Health Affairs* 31(11): 2464-2473.
- McInerney, M and JM Mellor. 2012. “Recessions and Seniors’ Health, Health Behaviors, and Healthcare Use: Analysis of the Medicare Current Beneficiary Survey.” *Journal of Health Economics* 31: 744-751.
- Bronchetti, ET and M McInerney. 2012. “Revisiting Incentive Effects in Workers’ Compensation: Do Higher Benefits Really Induce More Claims?” *Industrial and Labor Relations Review* 65(2), pp. 288-315.
- McInerney, M and KI Simon. 2012. “State Workers’ Compensation Program Reforms and Social Security Disability Receipt.” *Industrial Relations* 51(1): 57-88.
- Hellerstein, JK, M McInerney, and D Neumark. 2011. “Neighbors and Co-Workers: The Importance of Residential Labor Market Networks.” *Journal of Labor Economics* 29(4): 659-695.
- McInerney, M. 2010. “Privatizing Public Services and Strategic Behavior: The Impact of Incentives to Reduce Workers’ Compensation Claim Duration.” *Journal of Public Economics* 94(9-10): 777-789.
- Hellerstein JK, D Neumark, and M McInerney. 2010. “Spatial Mismatch, Immigrant Networks, and Hispanic Employment in the United States.” *Annales d’Economie et de Statistique/Annals of Economics and Statistics* 99/100: 141-167.
- Hellerstein, JK, D Neumark, and M McInerney. 2008. “Spatial Mismatch or Racial Mismatch?” *Journal of Urban Economics* 64(2) 464-479.

NON-REFEREED BOOK CHAPTERS

- Hellerstein, JK, D Neumark, and M McInerney. “Changes in Workplace Segregation in the United States between 1990 and 2000: Evidence from Matched Employer-Employee Data,” in Stefan Bender, Julia Lane, Kathryn Shaw, Fredrik Andersson, and Till von Wachter, eds. *The Analysis of Firms and Employees: Quantitative and Qualitative Approaches*, 2008 (University of Chicago Press).

WORKING PAPERS

Bronchetti, E and M McInerney. 2023. “Work-Related Injuries and Older Workers: Earnings, Labor Supply, Program Participation, and Retirement.”

Alsan, M, MK Bundorf, M Fisher, M McInerney, A Ortega, K Simon, R Winecoff, and E Ziedan. 2023. “Racial and Ethnic Segregation in Nursing Home and Ambulatory Care.”

Lipton, B, J Garcia, M Boudreaux, P Azatyan, and M McInerney. 2023. “Most State Medicaid Programs Cover Routine Eye Exams for Adults, but Coverage of Other Routine Vision Services Varies.” Revised and resubmitted.

McInerney, M, JM Mellor, C Pelnik (GSAS '24), LM Sabik. 2022. “Implications of the Growth of Defined Contribution Retirement Plans for Safety Net Eligibility: The Case of Medicaid.”

Bundorf, MK, M McInerney, K Simon, and R Winecoff. 2022. “The Effect of Insurance on Health: Evidence from Increased Access to Health Insurance Before Age 65.”

McInerney, M, M Rutledge, and SE King. “How Much Does Out-of-Pocket Medical Spending Eat Away at Retirement Income?” October 2017. Center for Retirement Research at Boston College Working Paper (CRR WP 2017-13).

McInerney, M. “The Medicaid Buy-In and the Employment and Earnings of Social Security Disability Insurance Beneficiaries.” November 2014. Center for Retirement Research at Boston College Working Paper (CRR WP 2013-20).

GRANTS AND CONTRACTS

Co-Investigator. “Medicaid Vision Benefits, Access to Vision Care, and Fall-Related Outcomes Among Older Low-Income Adults.” National Eye Institute. 2022-2026. (Tufts award: \$363,968)

Principal Investigator. “Drivers of Racial Segregation in Physician Services: Implications for Health Outcomes Equity.” NBER Pilot project funded by the National Institute on Aging. (\$50,000) 2022-2023.

Co-Investigator. “The Long-Run Effects of Workplace Injuries on Older Workers: Earnings, SSDI, SSI, and Early Retirement.” Social Security Administration (through University of Wisconsin Center for Financial Security) (Tufts award: \$74,861) (October 2022-September 2023)

Co-Investigator. “Long-run Effects of Workplace Injuries on Retirement Expectations and Outcomes.” Alfred P. Sloan Foundation (through NBER). July 2022-June 2023. (Tufts award: \$37,500)

Principal Investigator. “Access to Care by Low-Income Senior Medicare Beneficiaries Direct and Indirect Effects of State Medicaid Expansions to Working-Age Adults.” Agency for Healthcare Research and Quality R01HS025422. August 2017-September 2023. (\$968,036)

Senior Investigator. “The Effect of Insurance on Health: Evidence from Increased Access Before Age 65.” National Institute on Aging. R03AG059110. September 2018-May 2020. (\$134,466)

Principal Investigator. “Interactions Between Local Opioid Use and Work Outcomes.” Spring 2018. Tufts FRAC Faculty Research Fund. (\$2,100)

Co-Investigator. “How Much Does Out-of-Pocket Medical Spending Eat Away at Social Security Benefits.” Social Security Administration. Summer 2017. (Administered through Boston College Center for Retirement Research.) (\$27,230)

Principal Investigator. “Medicaid Receipt and Access to Care Among Low-Income Adults.” FRAC Senior Research Semester Fellowship for Fall 2016.

Principal Investigator. “Insurance Expansions and Medicare Beneficiaries.” May 2015. FRAC Grant-in-Aid. (\$330)

Principal Investigator, “Examining Differences by Ethnicity in the Propensity to File for Workers’ Compensation Insurance.” Department of Labor Scholars program. 2015. (\$39,903)

Co-Principal Investigator, “Does Increased Access to Health Insurance Impact Claims for Workers’ Compensation” Funded by the W.E. Upjohn Institute for Employment Research Early Career Research Grant program. 2015. (\$4,964)

Co-Principal Investigator, “Do Hispanic Workers Face Wage Penalties in the U.S. Labor Market?” Funded by the W.E. Upjohn Institute for Employment Research Early Career Research Grant program. 2013. (\$5,000)

Principal Investigator, “The Medicaid Buy-In and the Employment, Earnings, and Out of Pocket Medical Expenditures of Social Security Disability Insurance Beneficiaries.” Funded by the Steven H. Sandell Grant Program (funded by the Social Security Administration) sponsored by the Center for Retirement Research at Boston College. May 2012 to September 2013. (\$44,985)

Co-Principal Investigator, “Consequences of the Great Recession on Health and Health-Related Outcomes,” with Jennifer M. Mellor and Lauren Hersch Nicholas. Funded by the Russell Sage Foundation Great Recession Initiative. January 2012 to June 2013. (\$166,673)

NON-ACADEMIC EMPLOYMENT

Statistician, Center for Economic Studies, Bureau of the Census, 2003-2008.

Training Specialist, Covenant House New York, New York, NY, 1999-2000.

Catastrophe Risk Analyst, E.W. Blanch Company, Minneapolis, MN, 1998-1999.

TEACHING EXPERIENCE

Health Economics (undergraduate)

Labor Economics (undergraduate)

Econometrics (undergraduate)

International Lessons for the Social Safety Net: Health, Unemployment, and Related Public Policies in the United States and France (undergraduate, Tufts in Talloires)

Public Economics (undergraduate)

Economics of Policy-Making at the State and Local Level (MPP)

Benefit-Cost Analysis (MPP)

Regression Methods for Policy Analysis (MPP)

Principles of Microeconomics (undergraduate)

PRESENTATIONS

2023: University of Massachusetts at Amherst, North Carolina State University.

2022: NBER Summer Institute. Association for Public Policy Analysis and Management annual conference.

2021: Wayne State University.

2020: Tisch Faculty Research Workshop at Tufts University. Eastern Economic Association Meetings. Tufts Department of Economics Brown Bag Series. North Carolina State University (cancelled due to COVID-19).

2019: Harvard/BU/MIT Joint Health Economics Seminar Series. Essen Health Conference, University of Rhode Island

2018: Federal Reserve Bank of Boston New England Study Group. Tufts Community Health/Occupational Therapy seminar, American Society for Health Economists Annual Conference, AcademyHealth Annual Research Meeting, Western Economics Association Meeting.

2017: International Health Economics Association, Association for Public Policy Analysis and Management. Retirement Research Consortium.

2016: American Economic Association Allied Statistical Sciences Association Meetings, American Society for Health Economists Biennial Conference, AcademyHealth Health Economics Interest Group Meeting, Boston College Center for Retirement Research, University of Massachusetts-Lowell

2015: University of North Dakota, Wellesley College, Association for Public Policy Analysis and Management

2014: Tufts University, University of Maryland at College Park, Northeastern University, Emory University

2013: Cornell University, Bryn Mawr College, Association for Public Policy Analysis and Management Annual Meeting

2012: American Economic Association Allied Statistical Sciences Association Meetings, North Carolina State University, University of Richmond

2011: Association for Public Policy Analysis and Management Annual Meeting, Population Association of America Meeting, Southern Economic Association Meeting

2010: Southern Economic Association Meetings, Association for Public Policy Analysis and Management Meetings

2009: Western Economic Association Meetings

2008: Southern Economic Association Meeting, Association for Public Policy Analysis and Management Annual Meeting, Western Economic Association Meeting, Georgia State University, University of Delaware, College of William and Mary, Mount Holyoke College, Trinity College, College of the Holy Cross, University of Massachusetts at Boston, Rutgers University Newark, Urban Institute, U.S. Census Bureau

2007: Census Research Data Center Annual Conference

2006: Southern Economic Association Meetings, Workers' Compensation Research Group, Workers' Compensation Research Institute

AWARDS AND HONORS

Economics and Society Speaker, University of Rhode Island, November 2019
 Senior Research Semester Fellowship, Tufts University, Fall 2016
 Class of 1953 Term Distinguished Associate Professor, College of William and Mary, 2014
 Alumni Fellowship Award, College of William and Mary, 2014
 Summer Research Grant, College of William and Mary, 2010
 Reves Center Faculty International Travel Grant, College of William and Mary, 2009
 Matthews Summer Research Grant, College of William and Mary, 2009
 Economic Club of Washington, DC Doctoral Research Fellowship, 2007
 John Jones Scholar Award, Workers' Compensation Research Institute, 2006

PROFESSIONAL SERVICE

Chair, NLSY79 Pathways Working Group. 2023

Editorial Review Board, *INQUIRY: The Journal of Health Care Organization, Provision, and Financing*, 2022-

Chair, National Longitudinal Surveys Technical Review Committee, 2021-

Member, Workers' Compensation Research Institute Academic Advisory Council, 2021-

Member, Scientific Committee, Essen Health Conference 2020, 2019-20

Elected Member, National Academy of Social Insurance (NASI), 2018-

Member, National Longitudinal Surveys Technical Review Committee, 2018-2021

Member, AcademyHealth Health Economics Interest Group Advisory Group, 2016-18

Referee: *American Economic Journal: Applied Economics*, *Journal of Human Resources*, *Journal of Public Economics*, *Journal of Health Economics*, *JAMA*, *Review of Economics and Statistics*, *RAND Journal of Economics*, *Health Economics*, *Journal of Policy Analysis and Management*, *American Journal of Health Economics*, *Industrial and Labor Relations Review*, *Industrial Relations*, *Health Services Research*, *Demography*, *Medical Care Research and Review*, *Journal of Urban Economics*, *Labour Economics*, *Economics of Education Review*, *Southern Economic Journal*, *Economic Inquiry*, *Contemporary Economic Policy*, *Social Science and Medicine*, *American Journal of Industrial Medicine*, *Spatial Economic Analysis*, *Urban Studies*, *Criminology*, *Public Health Nutrition*

CeMent Workshop for Junior Faculty, 2011

Honors Examiner, Swarthmore College, 2010

Reviewer, National Science Foundation

External Reviewer, Carleton College Political Economy Program

Department and Program:

Member, Secondary Appointment Committee, 2023-

Liaison, Economic Society, 2022-

Liaison, Committee on Work-Life Balance, 2022-

Member, MS Graduate Program Committee, 2022-

Associate Director, Tufts MS Program in Economics, 2020-22

Member, Tufts Economics Faculty Search Committee, 2020-21

Member, Courtesy Appointments Committee, 2020-21

Chair, Tufts Economics Seminar and Named Lecture Committee, 2017-18; 2018-19; 2019-20
 Member, Committee to Plan Departmental Celebration of Degree Conferral, Spring 2020
 Departmental contact for Stata tutors, 2019-20
 Member, Cummings Building Committee, 2017-18
 Member, Tufts Economics Undergraduate Awards Committee, 2014-16
 Member, Tufts Economics Workload Committee, Spring 2016
 Member, Tufts Economics Seminar Committee, 2015-16
 Member, Tufts Economics Faculty Search Committee, 2014-2015
 Member, W&M Curriculum Committee, 2012-2013, 2013-2014
 Member, W&M Economics Faculty Search Committee, 2010-2011, 2013-2014
 Member, W&M Glenn and Goble Award Selection Committee, 2010-2011, 2013-2014
 Member, W&M Barry Award Selection Committee, 2009-2010, 2010-2011, 2012-2013
 Member, Thomas Jefferson Program in Public Policy Governing Board, 2008-2013
 Member, Thomas Jefferson Program in Public Policy Admissions Committee, 2012-2013

College:

Co-Chair, HEALS PhD Working Group, 2022-2023
 Member, Graduate School of Arts and Sciences Policies and Programs Committee 2020-22
 Member, Faculty Research Support Advisory Committee, 2019-24
 Member, Academic Awards Committee, 2018-23
 Faculty Liaison, Tufts University Swimming and Diving Teams, 2018-20
 Member, DISC Director Search committee, 2017-18; 2018-19
 Member, Tufts Data Science Major Working Group, 2017-18
 Chair, Tufts IT Committee 2020-22
 Member, Tufts IT Committee, 2017-20
 Member, Secure and Equitable Society Research and Scholarship Strategic Planning Working Group (Tufts), 2018
 Appointed Faculty Senate Representative, Tufts RFP for Health Insurance Carriers, 2018
 Member, Health Professions Recommendation Committee (Tufts), Spring 2017-

Chair, W&M Faculty Compensation Board, 2013-14
 Member, W&M Faculty University Priorities Committee, Spring 2014
 Member, W&M COLL 400 Working Group, Spring 2014
 Member, W&M Truman Scholarship Selection Committee, 2010-2011, 2011-2012
 W&M New student advising, 2010-2011, 2011-2012, 2013-2014
 W&M Charles Center Summer Scholarship Selection Committee, 2011-2012, 2012-2013
 Participant, W&M WISE Program (The Women in Scientific Education Initiative)

PROFESSIONAL MEMBERSHIPS

American Economic Association
 American Society of Health Economists
 Association for Public Policy Analysis and Management
 AcademyHealth
 Committee for the Status of Women in the Economics Profession



Town of Arlington, Massachusetts

For Approval: Common Victualler License

Summary:

Jorvan Enterprise INC d/b/a Haveli Indian Cuisine, Kulwinder Singh Uppal, 464 Massachusetts Avenue

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Haveli_Inspection_Reports.pdf	Inspection Reports
▢	Reference Material	Haveli_CV_App.pdf	Application
▢	Reference Material	INSPECTION_REPORT_FORM_- APD_report_signed.pdf	APD REPORT SIGNED



Office of the Select Board
Licensing Board for the Town of Arlington
Town Hall, 730 Massachusetts Avenue, Arlington, Massachusetts 02476
Telephone: (781)316-3020 | Email: sbadmin@town.arlington.ma.us

INSPECTION REPORT FORM

NAME OF ESTABLISHMENT:

Haveli Indian Cuisine

ADDRESS:

464 Mass. Ave.

NAME OF APPLICANT:

Kulwinder Singh Uppal

TYPE OF LICENSE:

Common Victualler

REPORT DUE BY:

January 31, 2025

DEPARTMENTAL REPORT SECTION

DEPARTMENT: Fire

AFTER REVIEWING THE ABOVE APPLICANT, WE HAVE:

☐ No Comments or Concerns

☒ Comments

☐ Concerns

☐ Objections

The Fire Department does not have any outstanding violations or issues with 464 Mass Ave. They will be required to have a full inspection prior to opening and the fire alarm system will be required to be monitored if they are to be applying for an alcohol license.

APPLICANT SIGNATURE SECTION

I have received the above report and acknowledge said inspection. I fully understand that the establishment is not to open, or act upon the requested license/permit, until approved by the Select Board **and** all other applicable licenses/permits/certificates are issued by the correct departments. Any work done is done at the applicant's risk.

Signature: Ramjit Kaur

Date: 02/07/2025



Office of the Select Board
Licensing Board for the Town of Arlington
Town Hall, 730 Massachusetts Avenue, Arlington, Massachusetts 02476
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INSPECTION REPORT FORM

NAME OF ESTABLISHMENT:

Haveli Indian Cuisine

ADDRESS:

464 Mass. Ave.

NAME OF APPLICANT:

Kulwinder Singh Uppal

TYPE OF LICENSE:

Common Victualler

REPORT DUE BY:

January 31, 2025

DEPARTMENTAL REPORT SECTION

DEPARTMENT: Inspectional Services

AFTER REVIEWING THE ABOVE APPLICANT, WE HAVE:

☐ No Comments or Concerns

☒ Comments

☐ Concerns

☐ Objections

Building

- All building changes need permits.
- All sign changes need approval and a sign permit.
- Window signs cannot exceed 25% of the window.
- Certificate of Occupancy is required.

Plumbing

- All plumbing and gas fitting work requires licensed contractors to obtain permits from this office for their respective trades.

Electrical

- All electrical work requires that permits be obtained from this office for their respective trades by licensed contractors, and any new wiring must conform to the Mass. Electrical Code. Notify the Inspector of Wires in accordance with Chapter 143, Section 3L.

Please note that the Inspectional Services Department has no objection to the issuance of this license.

APPLICANT SIGNATURE SECTION

I have received the above report and acknowledge said inspection. I fully understand that the establishment is not to open, or act upon the requested license/permit, until approved by the Select Board and all other applicable licenses/permits/certificates are issued by the correct departments. Any work done is done at the applicant's risk.

Signature: _____

Kulwinder Singh Uppal

Date: 2-7-25



Office of the Select Board
Licensing Board for the Town of Arlington
Town Hall, 730 Massachusetts Avenue, Arlington, Massachusetts 02476
Telephone: (781)316-3020 | Email: sbadmin@town.arlington.ma.us

INSPECTION REPORT FORM

NAME OF ESTABLISHMENT:

Haveli Indian Cuisine

ADDRESS:

464 Mass. Ave.

NAME OF APPLICANT:

Kulwinder Singh Uppal

TYPE OF LICENSE:

Common Victualler

REPORT DUE BY:

January 31, 2025

DEPARTMENTAL REPORT SECTION

DEPARTMENT: Health Department

AFTER REVIEWING THE ABOVE APPLICANT, WE HAVE:

☐ No Comments or Concerns

☒ Comments

☐ Concerns

☐ Objections

The applicant has received an Plan Review packet from the Health Department. The Plan Review packet has not been returned to the Department as of 1/17/2025.

APPLICANT SIGNATURE SECTION

I have received the above report and acknowledge said inspection. I fully understand that the establishment is not to open, or act upon the requested license/permit, until approved by the Select Board **and** all other applicable licenses/permits/certificates are issued by the correct departments. Any work done is done at the applicant's risk.

Signature: Kulwinder Singh Uppal

Date: 2-7-25



Office of the Select Board
Licensing Board for the Town of Arlington
Town Hall, 730 Massachusetts Avenue, Arlington, Massachusetts 02476
Telephone: (781)316-3020 | Email: sbadmin@town.arlington.ma.us

INSPECTION REPORT FORM

NAME OF ESTABLISHMENT:

Haveli Indian Cuisine

ADDRESS:

464 Mass. Ave.

NAME OF APPLICANT:

Kulwinder Singh Uppal

TYPE OF LICENSE:

Common Victualler

REPORT DUE BY:

January 31, 2025

DEPARTMENTAL REPORT SECTION

DEPARTMENT: Planning Department

AFTER REVIEWING THE ABOVE APPLICANT, WE HAVE:

☐ No Comments or Concerns

☒ Comments

☐ Concerns

☐ Objections

The proposed business is located at the former site of Tango in a B5 Neighborhood Business District. The proposed use is a 99-seat Indian restaurant conducting both eat-in and takeaway. This business is an appropriate use for the neighborhood. The owners have experience managing a restaurant. A particular benefit to Arlington Center will be its late night hours from Thursday to Saturday which the area currently needs more of to support the nearby theatre.

The Department has no objection to the issuance of a Common Victualler license to this business.

Any changes in signage, including signs in the window, and changes to the façade of the building may be subject to review by this Department. The Applicant is reminded that all signs, including re-lettering of any existing signs, require a permit issued by the Building Department. Other provisions of the Zoning Bylaw may apply as determined by the Building Inspector.

APPLICANT SIGNATURE SECTION

I have received the above report and acknowledge said inspection. I fully understand that the establishment is not to open, or act upon the requested license/permit, until approved by the Select Board and all other applicable licenses/permits/certificates are issued by the correct departments. Any work done is done at the applicant's risk.

Signature: Kulwinder Singh Uppal

Date: 2-7-25

OFFICE OF THE SELECT BOARD

730 Massachusetts Avenue

Town of Arlington

Massachusetts 02476-4908

2025 JAN 14 PM 1:18

2025 JAN 14 PM 1:18
(781) 316-3020
(781) 316-3029 fax

\$60.00 Filing Fee

Inspections Dept. at 51 Grove St. must review completed application before returning to this office.

APPLICATION

To the Licensing Authorities of the Town of Arlington

The Undersigned hereby makes application for a

- ☒ **COMMON VICTUALLER LICENSE (Eat In)**
☐ **FOOD VENDOR LICENSE (Take Out Only)**

Location 464 Massachusetts Ave, Arlington MA, 02474

Name of Applicant Kulwinder Singh Uppal

Corporate Name (if applicable) Jorvan Enterprise INC

D/B/A Haveli Indian Cuisine

Date 1/14/2025

I/We hereby agree to conform in all respects to the conditions governing such License as printed in the By-Laws of the Town, and such other rules and regulations as the Selectmen may establish. With the signing of this application, the applicant acknowledges that:

- A. It is understood that the Board is not required to grant the license.
- B. no work is to commence at the premises of the proposed location which is the subject matter of this application until the license is approved by the Select Board, and, furthermore, any work done is done at the applicant's risk, and
- C. in the event of a proposed sale of a business requiring a Common Victualler License, an application for a transfer of said license will be deemed to be an application for a new license (subject to the rules and regulations herein contained), and the owner of such business shall be required to file with the Select Board a thirty day notice of his intention to sell same before such application will be acted upon by the Select Board.
- D. That the license is subject to revocation if the holder of the license does not comply with Town By-Laws or the Rules and Regulations of the Board.

Print Name Ramandeep Uppal

Signature Name [Signature]

Phone (Home) _____ usiness) _____

Email _____

INFORMATION RELATIVE TO APPLICATION

Breakfast _____

Yes ___ No X _____

Lunch _____

Yes X No ___ _____

Dinner _____

Yes X No _____

Do you own the property? Yes ___ No X Tenant at Will _____ Lease 15 (years)

Hours of Operation:

Day Sunday to Wednesday Hours 11AM to 10PM

Day Thursday to Saturday Hours 11AM to 12AM

Day _____ Hours _____

Floor Space 2500 + 2500 Sq. Ft. Seating Capacity (if any) 99

Parking Capacity (if any) _____ spaces Number of Employees 9

List Cooking Facilities (and implements)

Kitchen: Tandoor, 2x Range with 6 burners with standard oven, Fryer, refrigerated sandwich prep table 48", Refrigerated sandwich prep table 60", 2x Stock Top Burner, 48" flat top grill. 2 Bay Sink, Handwashing station

Prep Area: Tabletop blender, Mixer, Walk in Cooler, Chest Freezer, NSF certified Shelves, Prep sink, Handwashing station

Will a food scale be in use for sale of items to the public? Yes ___ No X

Will catering services be provided by you? Yes X No ___

The following items must be submitted with the application:

- | | |
|--|---------------------|
| 1. Layout Plan of Facility & Fixtures | Date Received _____ |
| 2. Site Plan (obtained at Bldg. Dept., 51 Grove St.) | Date Received _____ |
| 3. Outside Facade and Sign Plan (dimensions, color) | Date Received _____ |
| 4. Menu | Date Received _____ |
| 5. Maintenance Program | Date Received _____ |

If the facilities are not yet completed, provide estimated cost of work to be done \$ _____

FOR OFFICE USE ONLY

Scheduled Hearing when Application will be presented to Select Board for approval:

Date _____ Time _____

Board Action: Approved Yes _____ No _____

APPLICANT'S RESUME

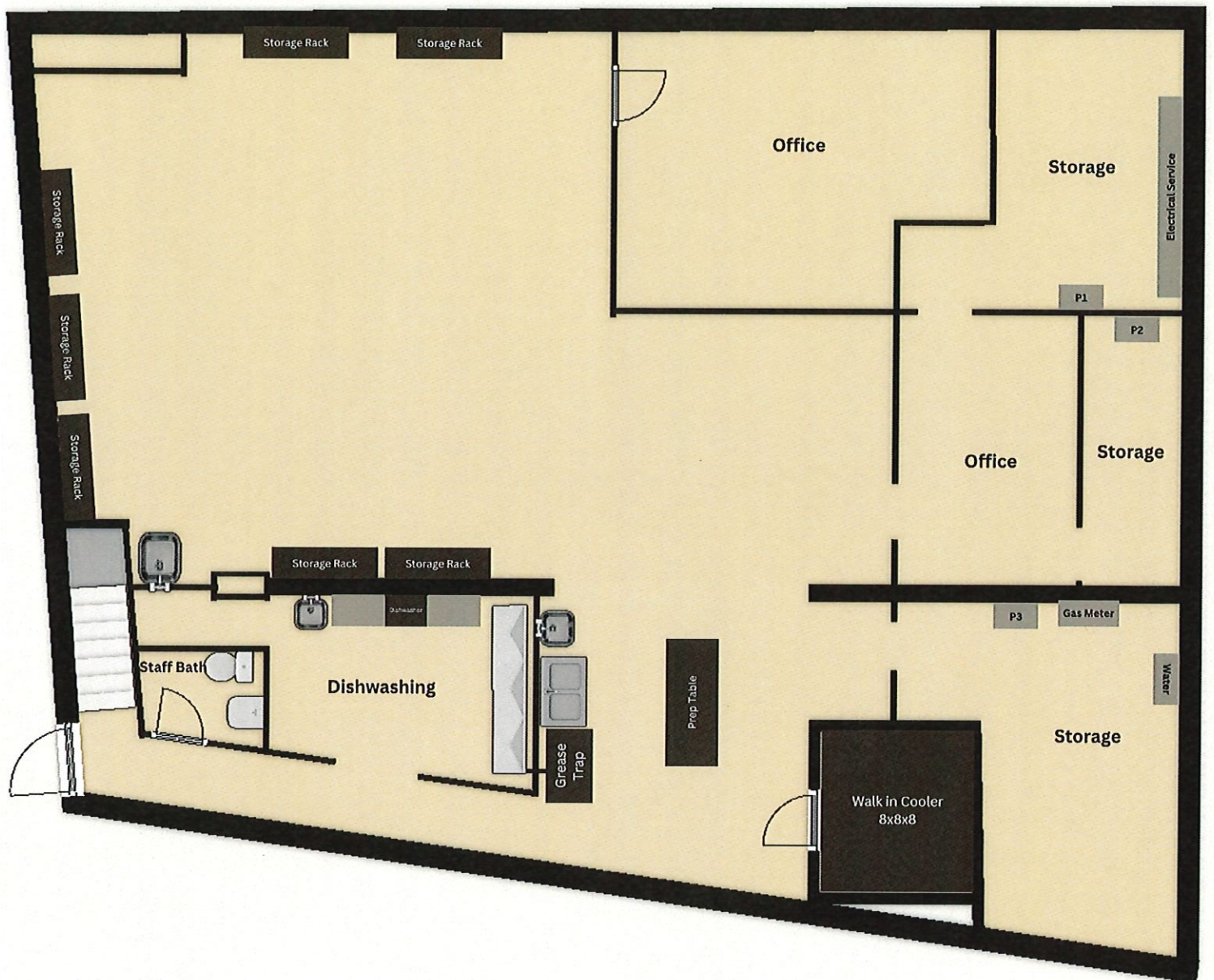
Food Business Experience of Applicant

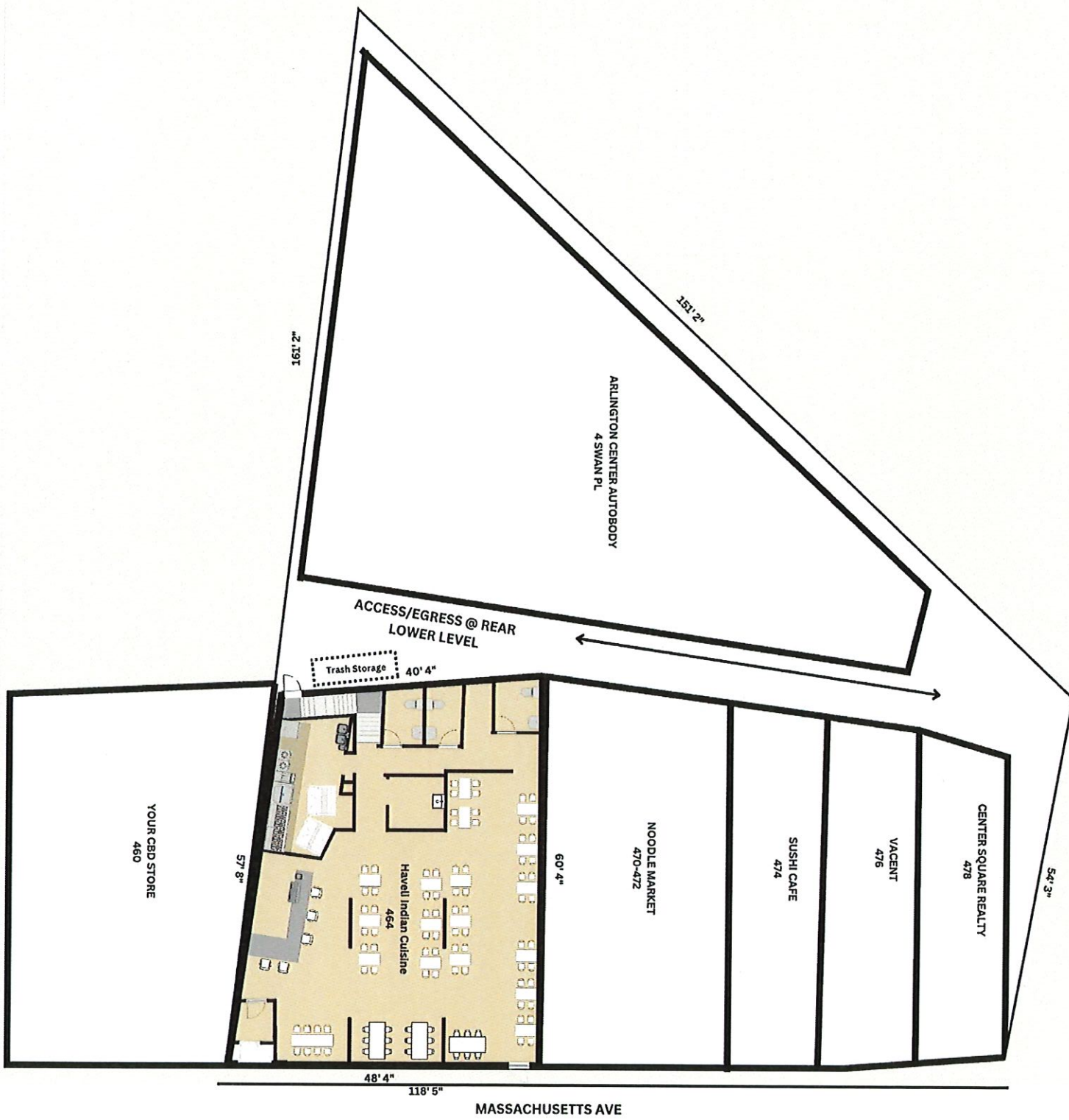
From	1998	to	2018
Employee	D/B/A India Palace		
Sole Owner	Location 23 Union Sq, Somerville, MA		
Partnership	Type Food Indian		
Corporation	Navjot Kaur Corporation	Number of Employees	7

From	2024	to	Present
Employee	D/B/A Indian Pavilion		
Sole Owner	Location 511 Main St, Hyannis, MA		
Partnership	Type Food Indian		
Corporation	Pavillion Cape Cod Corp	Number of Employees	6

List any other information that you feel will assist in the review of this application.
Kulwinder has been in the restaurant business for over 25 years, Having experience with his family-owned business in the greater Boston area, as well as his recent endeavor in Cape Cod.







YOUR CBD STORE
460

57' 8"

Trash Storage
40' 4"

ACCESS/EGRESS @ REAR
LOWER LEVEL

Havell Indian Cuisine
464

60' 4"

NOODLE MARKET
470-472

SUSHI CAFE
474

VACANT
476

CENTER SQUARE REALTY
478

54' 3"

ARLINGTON CENTER AUTOBODY
4 SWAN PL

151' 2"

211' 1"

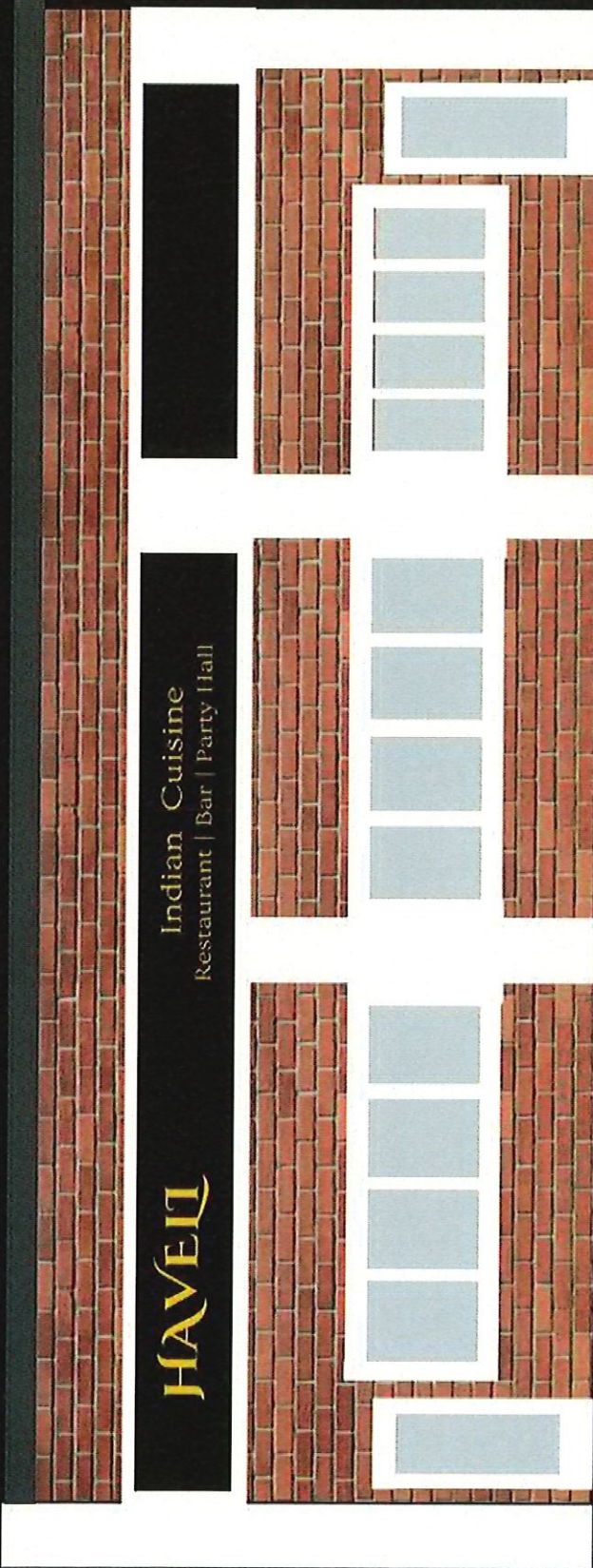
48' 4"

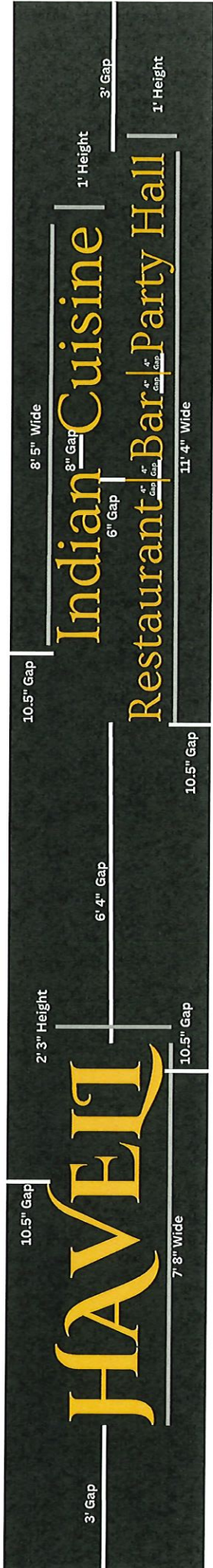
118' 5"

MASSACHUSETTS AVE

HAVELI

Indian Cuisine
Restaurant | Bar | Party Hall





HAVELI

Indian Cuisine
Restaurant | Bar | Party Hall

HAVEIT

MENU

Appetizers

Veggie Samosas \$7

Fried triangular pastries filled with vegetables and served with chutney.

Chaat Samosas \$12

Vegetarian samosas topped with chickpeas, spices and chutney.

Aloo Tikki \$7

Crispy potato patties seasoned with spices, served with chutney.

Meat Samosa \$9

Savory blend of minced meat encased in a crisp, golden pastry.

Chicken Pakora \$9

Tender Pieces of chicken, delicately seasoned, coated in a crispy batter, and fried to golden perfection.

Paneer Pakora \$9

Soft cubes of paneer coated with chickpea flour and fried, served with chutney.

Veggie Pakora \$7

Crispy Fried vegetable fritters, coated with chickpea flour and fried, served with chutney.

Paneer Wings \$9

Indian cottage cheese fried and covered with barbecue sauce.

Paneer Wings \$14

Assortment including Vegetable Pakora, Vegetable Samosa, Vegetable Tikki, and Cheese Pakora.

Papadum \$3

lightly seasoned lentil wafer, delicately fried to a crisp perfection,

Chili Chicken \$20

Tender chicken pieces stir-fried with peppers, onions, and chili sauce, creating a spicy and flavorful dish.

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

HAVE IT

Tandoori Sizzlers

Chicken Tandoori \$22

Tender chicken marinated in a spiced yogurt mixture and cooked to perfection in our clay oven.

Chicken Seekh Kabob \$20

A delicious Indian dish made with ground minced chicken and a mix of spices.

Lamb Seekh Kabob \$20

A delicious Indian dish made with lamb and a blend of spices.

Chicken Tikka \$22

Marinated boneless chicken grilled to perfection in our tandoor, flavored with a blend of Indian spices for a smoky and delicious taste.

Fish Tikka* \$22

Marinated boneless fish grilled to perfection in our tandoor oven, flavored with a blend of Indian spices for a smoky and delicious taste.

Biryani

Veggie Biryani \$20

Basmati rice cooked with a colorful array of mixed vegetables, traditional spices, and fresh herbs.

Chicken Biryani \$21

Basmati rice with tender chicken and mixed vegetables, traditional spices, and fresh herbs.

Lamb Biryani \$22

Basmati rice with tender lamb and mixed vegetables, as well as spices and fresh herbs.

Shrimp Biryani* \$22

Basmati rice with tender shrimp as well as mixed vegetables, spices, and fresh herbs.

Fish Biryani* \$22

Basmati rice with tender fish as well as mixed vegetables, spices, and fresh herbs.

***These items may be served raw or under-cooked. Consuming raw or under-cooked meats, poultry, seafood, shellfish or eggs may increase your risk of foodborne illness.**

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

HAVELI

Vegetarian Enterees

Shahi Paneer Korma \$20

Cubes of paneer cooked in a creamy sauce made with tomatoes, onions, garlic, and a blend of Indian spices.

Malai Kofta \$20

Fried paneer and vegetable dumplings in a rich, flavorful tomato and cream sauce.

Paneer Tikka Masala \$20

Cubes of paneer in a rich, creamy tomato sauce with Indian spices, delivering a vegetarian delight.

Baingan Bharta \$19

Smoky roasted eggplant mashed and cooked with onions, tomatoes, and spices

Veggie Curry \$16

Pieces of fresh vegetables mixed into a rich curry sauce with onions, tomatoes, garlic, and indian spices.

Lychee Paneer \$19

Cubes of Paneer cooked in a rich lychee based gravy.

Saag Paneer \$20

A traditional Punjabi dish of creamy spinach cooked with paneer cubes and spices.

Matar Paneer \$20

A classic North Indian dish with paneer cubes and peas cooked in a rich tomato-based gravy.

Channa Masala \$19

A flavorful North Indian dish made with chickpeas cooked in a spiced tomato-based gravy.

Dal Makhani \$16

Lentils cooked with fresh herbs and spices, sautéed in butter, and finished with a sprinkle of fresh coriander.

Navratan Korma \$19

Fresh Vegetables simmered in a creamy, mildly spiced curry sauce with nuts and aromatic spices.

Pindi Masala \$18

A flavorful dish of okra mixed with a blend of aromatic spices

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

HAVELI

Chicken Enterees

Chicken Tikka Masala \$20

Tender pieces of chicken, served in a creamy tomato-based sauce with a hint of smokiness.

Chicken Curry \$18

Tender chicken pieces in a rich, aromatic curry sauce with onions, tomatoes, garlic, and indian spices.

Chicken Korma \$20

Tender chicken pieces simmered in a creamy, mildly spiced curry sauce with nuts and aromatic spices.

Chicken Vindaloo \$20

Juicy chicken cooked in a fiery and tangy curry sauce infused with vinegar, garlic, ginger, and various spices.

Chicken Saag \$19

Tender chicken cooked in a rich, creamy spinach sauce with a blend of aromatic spices.

Chicken Mango \$20

Tender chicken cooked in a mango-infused curry sauce, creating a blend of sweet and savory flavors.

Butter Chicken \$20

Tender pieces of chicken simmered in a rich and creamy tomato-based sauce, infused with aromatic spices

Lychee Chicken \$20

Tender pieces of chicken cooked in a rich, lychee based gravy.

Lamb Entrees

Lamb Tikka Masala \$22

Tender pieces of lamb served in a creamy tomato-based sauce with a hint of smokiness.

Lamb Curry \$22

Tender lamb pieces cooked in a rich, flavorful curry sauce with onions, tomatoes, garlic, and various spices.

Lamb Korma \$22

Tender lamb pieces simmered in a creamy, mildly spiced curry sauce with nuts and aromatic spices.

Lamb Saag \$22

Tender lamb cooked in a rich, creamy spinach sauce with a blend of aromatic spices.

Lamb Vindaloo \$22

Succulent lamb cooked in a fiery and tangy curry sauce infused with vinegar, garlic, ginger, and various spices.

Lamb Mango \$22

Tender lamb pieces cooked in a mango-infused curry sauce, creating a blend of sweet and savory flavors.

Keema Mutter \$20

Tender minced lamb simmered in a fragrant curry sauce with vibrant spices and tender peas

Lamb Rogan Josh \$20

Tender minced lamb simmered in a fragrant curry sauce with vibrant spices and tender peas

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

HAVELI

Shrimp Entrees

Shrimp Tikka Masala* \$22

Tender pieces of shrimp served in a creamy tomato-based sauce with a hint of smokiness.

Shrimp Curry* \$22

Tender shrimp cooked in a robust, spicy curry sauce with tomatoes, onions, and a blend of traditional spices.

Shrimp Korma* \$22

Juicy shrimp cooked in a mild, creamy sauce with a hint of spices and nuts.

Shrimp Vindaloo* \$22

Juicy shrimp cooked in a fiery and tangy curry sauce infused with vinegar, garlic, ginger, and various spices.

Shrimp Saag* \$22

Tender shrimp cooked in a savory spinach sauce with a mix of herbs and spices.

Shrimp Mango* \$22

Tender shrimp cooked in a mango-infused curry sauce, creating a blend of sweet and savory flavors.

Fish Entrees

Fish Tikka Masala* \$22

Tender pieces of fish served in a creamy tomato-based sauce with a hint of smokiness.

Fish Curry* \$22

Tender fish cooked in a robust, spicy curry sauce with tomatoes, onions, and a blend of traditional spices.

Fish Korma* \$22

Juicy fish cooked in a mild, creamy sauce with a hint of spices and nuts.

Fish Vindaloo* \$22

Juicy fish cooked in a fiery and tangy curry sauce infused with vinegar, garlic, ginger, and various spices.

Fish Saag* \$22

Tender fish cooked in a savory spinach sauce with a mix of herbs and spices.

Fish Mango* \$22

Tender fish cooked in a mango-infused curry sauce, creating a blend of sweet and savory flavors.

***These items may be served raw or under-cooked. Consuming raw or under-cooked meats, poultry, seafood, shellfish or eggs may increase your risk of foodborne illness.**

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

HAVELI

Breads

Plain Naan \$5

Soft and fluffy traditional Indian bread baked to perfection in a tandoor oven.

Garlic Naan \$6

Buttery, golden-brown Indian naan bread infused with aromatic garlic.

Potato Naan \$6

Buttery, golden-brown naan bread stuffed with flavorful potato filling.

Tandoori Roti \$4

Traditional Indian flatbread baked in a clay oven.

Plain Paratha \$5

Traditional Indian flatbread, expertly layered and griddled.

Aloo Paratha \$6

Traditional Indian flatbread, stuffed with seasoned mashed potatoes.

Keema Naan \$6

Soft bread generously stuffed with flavorful minced lamb, baked to perfection in a tandoor oven

Sides and Desserts

Raita \$4

A refreshing yogurt-based condiment infused with diced cucumbers and tomatoes.

Kheer \$5

A creamy and sweet Indian rice pudding, delicately flavored with cardamom, saffron, and nuts.

Ras Malai \$5

Soft, spongy cottage cheese dumplings soaked in a sweetened, saffron-infused milk syrup.

Gulab Jaman \$5

Milk-based dumplings immersed in a fragrant syrup infused with cardamom and rose water.

Kulfi \$5

A traditional Indian frozen dessert, available in mango and almond.

Ice Cream \$5

A classic dessert, available in chocolate and vanilla flavors.

Plain Yogurt \$5

A refreshing accompaniment that adds a cool contrast to the rich flavors of our dishes.

Mixed Pickle \$4

Variety of vegetables, fruits, and spices preserved in vinegar.

Mango Chutney \$5

A sweet blend of mangos and spices.

Before placing your order, please inform your server if a person in your party has a food allergy

464 Massachusetts Ave, Arlington MA, 02474

Haveli Indian Cuisine
Applicant: Kulwinder S Uppal
464 Massachusetts Avenue, Arlington

Maintenance Program

Preventive Maintenance Schedule

- Stoves, ovens, grills, and fryers: Clean and inspect burners, gas connections, and thermostats weekly.
- Refrigerators and freezers: Check seals, clean coils, and ensure proper temperature monthly.
- Dishwashers: Clean filters and check for leaks weekly.

HVAC Systems:

- Inspect filters, ducts, and thermostat functions quarterly.
- Service heating/cooling systems before seasonal transitions.

Plumbing:

- Check for leaks, clogs, and water pressure monthly.
- Inspect grease traps weekly and clean as required.

Electrical Systems:

- Test outlets, switches, and lighting fixtures monthly.
- Inspect circuit breakers and backup power systems quarterly.

Fire Safety:

- Check fire extinguishers and hood suppression systems monthly.
- Conduct fire drills and inspect smoke detectors biannually.

Furniture and Fixtures:

- Inspect and repair chairs, tables, and decor monthly.
- Clean windows, walls, and ceilings weekly.

Daily Maintenance Tasks

1. Clean all workstations, utensils, and appliances.
2. Empty trash bins and clean waste storage areas.
3. Sanitize high-touch surfaces like doorknobs and counters.
4. Sweep and mop all floors.
5. More to add as we operate and make more detailed list as needed



Office of the Select Board
Licensing Board for the Town of Arlington
Town Hall, 730 Massachusetts Avenue, Arlington, Massachusetts 02476
Telephone: (781)316-3020 | Email: sbadmin@town.arlington.ma.us

INSPECTION REPORT FORM

NAME OF ESTABLISHMENT:

TYPE OF LICENSE:

ADDRESS:

NAME OF APPLICANT:

REPORT DUE BY:

DEPARTMENTAL REPORT SECTION

DEPARTMENT: _____

AFTER REVIEWING THE ABOVE APPLICANT, WE HAVE:

☐ No Comments or Concerns

☐ Comments

☐ Concerns

☐ Objections

APPLICANT SIGNATURE SECTION

I have received the above report and acknowledge said inspection. I fully understand that the establishment is not to open, or act upon the requested license/permit, until approved by the Select Board **and** all other applicable licenses/permits/certificates are issued by the correct departments. Any work done is done at the applicant's risk.

Signature: Kelvin Singh

Date: 2-12-25



Town of Arlington, Massachusetts

Removal of Certain Parking Signs on Mystic Street

Summary:

Jim Feeney, Town Manager

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	Mystic_Street_Parking_Memo.pdf	Mystic Street Parking Memo



**Town of Arlington
Office of the Town Manager**

**James Feeney
Town Manager**

**730 Massachusetts Avenue
Arlington, MA 02476-4908
Phone (781) 316-3010
Website: www.arlingtonma.gov**

To: Members of the Select Board

**Cc: Julie Flaherty, Police Chief
Corey Rateau, Police Officer
John Alessi, Transportation Planner
Daniel Warren, Operations Manager**

From: James Feeney, Town Manager

Date: February 7, 2025

RE: Removal of Certain Parking Signs on Mystic St.

The Board is in receipt of an email request from Mr. Paul Schlichtmann to remove aged parking signage located along the west side of Mystic St. between Russell St. and Chestnut St. The existing signs prohibit parking from 7-9 a.m. and 4-6 p.m.

Upon review, it was determined these signs indeed likely coincided with a prior roadway alignment that permitted motorists to use the curb lane for travel during rush hours; however, the current configuration of Mystic St. following realignment and addition of striping for a bike lane prohibits vehicular travel in the curb lane. Further research found these parking restrictions were not codified in the Traffic Rules and Orders, likely rendering them unenforceable.

As such, it is recommended the Board approve the removal of these five (5) parking signs which prohibit parking during rush hour commute periods. The removal of the signs would result in less confusion, and parking would now be consistent with parking on the east side of the street on this same segment. Images of the signs which are the subject of this memorandum are included herein for reference.













Town of Arlington, Massachusetts

Town Manager Evaluation

ATTACHMENTS:

	Type	File Name	Description
▢	Reference Material	TM_Evaluation_Feb_2025_J_Feeney.pdf	Memo



TOWN OF ARLINGTON

HUMAN RESOURCES DEPARTMENT

730 MASSACHUSETTS AVENUE, ARLINGTON, MA 02476
PHONE (781) 316-3120 FAX: (781) 316-3129

CARYN COVE MALLOY
DIRECTOR OF HUMAN RESOURCES

Memorandum

To: Select Board Chair Steve DeCoursey
From: Director of Human Resources Caryn Malloy
Re: Town Manager James Feeney Annual Performance Review
Date: February 11, 2025

Pursuant to the evaluation forms completed by each member of the Select Board I am providing you with the consensus document for your review.

1. Personal Characteristics – Average Score 4.88

The Town Manager is described as exhibiting “maturity and judgement at a level one would expect in a seasoned town manager with years of experience”. Mr. Feeney was complemented for his “exceptional judgement” in navigating unforeseen matters. He is described as an exemplary ethical decision maker who sets a “positive example” for department heads and employees, maintaining a “professional and ethical work environment” for all who work for the Town.

2. Professionalism – Average Score 4.69

Mr. Feeney was described showing an appropriate awareness of the “areas in which he needs to gain more expertise” while also building on his years of experience on the “operational side” as he continues to “rapidly build an impressive breadth and depth of skill in the dimensions of the town manager role that are newer to him”. Since becoming part of the Town’s management team many years ago Mr. Feeney “has shown a strong commitment to local government and municipal management”; he has sought to increase “his knowledge and overall competence” and encourages his department heads to do the same. Mr. Feeney was described as appropriately availing himself of the expertise and advice of his staff and leadership team while “remaining comfortable with the responsibility of making the final call”.

3. Public Relations/Communication – Average Score 4.9

The Town Manager is described as actively engaging with residents and town employees actively soliciting feedback to “guide changes to deliver positive outcomes for all of Arlington’s residents”. Mr. Feeney “maintains high standards for timely, strategic public communication” and his “Town Hall updates have become a welcome feature on the Town’s website and on

ACMI.” One member also described gratitude for Mr. Feeney’s assistance in understanding the “issues underlying residents’ complaints”.

4. Board Support/Relations – Average Score 4.72

Mr. Feeney is complimented for his “respect” and “open and transparent” communication style with Board Members. Multiple Board members complimented Mr. Feeney for keeping Board members informed with “updates and issues and activities throughout Town”. The Town Manager was also complimented for his “proactive situational head-up messages” and for his thorough and timely responses to issues raised at Select Board meetings. One member described their regular check ins with the Town Manager as “invaluable”.

5. Community Leadership – Average Score 4.78

The Town Manager is described as maintaining “excellent visibility and approachability” in the community while “prioritizing his necessarily limited bandwidth effectively”. He is described as maintaining “strong and effective communications” with the Town’s legislative delegation. One member indicates that they have received strong positive feedback from volunteer groups with whom they frequently interact and that in this area Mr. Feeney “deserves the highest score”.

6. Organizational Leadership/Personnel Management – Average Score 4.73

Mr. Feeney is described as being “committed to carrying out the Select Board’s goals and priorities while balancing the needs of the staff”. Board Members describe Mr. Feeney as a “gifted leader of people” who is “generous with recognition” and “fair and decisive” when problems arise. The Town Manager was complimented for assembling a “strong leadership team” with a “keen eye for talent informed by a clear-minded sense of the Town’s best interest”.

7. Financial Management – Average Score 4.90

The Town Manager is described as demonstrating “a solid grasp of the financial complexities” of his position and that he is an “effective financial leader”. The Town Manager was complimented for his efforts to continually increase his overall financial knowledge and competence. Board Members were complimentary of his “ironclad commitment to fiscal controls, conservative budgeting and maintaining the Board’s override commitments”

8. Planning and Organization – Average Score 4.77

Members were impressed with Mr. Feeney’s revision of the Board/Town Manager’s goals document for the annual goals session in August; the result is described as balancing the “aspirational with the pragmatic” and “more meaningful” because it incorporates the goals of the Town Manager as well as individual Board members.

9. Overall – Average Score 4.8

Recognized Strengths

Mr. Feeney is described as an industrious and dedicated worker with strong leadership and communication skills. He has excellent problem-solving skills and is “able and willing to embrace and encourage new ideas”. He is described as treating Board Members and the public with respect and that he is respected by town employees. Mr. Feeney is described as having appropriate self-awareness in the areas in which he could benefit from additional learning (finance and labor). Mr. Feeney “approaches Arlington’s challenges with a proactive and solution-minded acumen which allow him to successfully navigate through complex situations”.

Areas for Improvement

A Board Member indicated they have experienced instances of inconsistency in policy direction put before the Board saying “policies of the town should reflect the Board’s direction and not that of outside groups or department heads”. With regard to hiring, especially at the Department Head level, a Board Member shared that the Town Manager should be more open to hiring external candidates. Another member recognized that there is a strain put on the Town Manager and existing staff coming from the challenges of hiring in a highly competitive labor market in the context of a community with significant budgetary limitations and high demand for town services.

Overall

A Board member shared that overall Mr. Feeney has done an “outstanding job” in his first eighteen months as Town Manager. Another member disagreed with Mr. Feeney’s self-evaluation statement that he aspires to someday “become a capable and respected Town Manager” because, in the Board Member’s opinion Mr. Feeney is already such a Town Manager and the Town is “fortunate to have him at the helm”.

Members shared that they “left some room for improvement” in various areas of their evaluations and they would additionally offer feedback in one-on-one meetings with the Town Manager.

Thank you for entrusting me to prepare this document. Please do not hesitate to contact me should you have any questions.



Town of Arlington, Massachusetts

NEW BUSINESS



Town of Arlington, Massachusetts

Next Scheduled Meeting of Select Board February 24, 2025

Summary:

When: Feb 12, 2025 07:15 PM Eastern Time (US and Canada)

Topic: Select Board Meeting

Register in advance for this webinar:

https://town-arlington-ma-us.zoom.us/webinar/register/WN_9E_GaCzGTsqNhc0Usujfng

After registering, you will receive a confirmation email containing information about joining the webinar.

Notice to the Public on meeting privacy In the interests of preventing abuse of videoconferencing technology (i.e. Zoom Bombing) all participants, including members of the public, wishing to engage via the Zoom App must register for each meeting and will notice multi-step authentication protocols. Please allow additional time to join the meeting. Further, members of the public who wish to participate without providing their name may still do so by telephone dial-in information provided above.